



DEPARTMENT OF
HIGHER EDUCATION &
WORKFORCE DEVELOPMENT

MISSOURI ECONOMIC & WORKFORCE REPORT

2020



2020 ECONOMIC REPORT

COVID-19

UPDATES

The 2020 Missouri Economic and Workforce Report gives a broad overview of Missouri's economy in the last year, using a wide variety of meaningful indicators. At the time of publishing this report, Missouri's economy is in the midst of the health and economic impact of the COVID-19 pandemic, as are the U.S. and world economies.

The data contained in this report focuses largely on economic activity in Missouri prior to the pandemic, using the most reliable and proven economic and workforce data resources available. Typically, these high-quality sources have some lag in publication due to the sound and thorough methodologies used to ensure accurate and reliable data. Analysis of economic shifts will always rely on these key sources for the most precise representation of the economy, and Missouri will continue to monitor these indicators throughout the state's economic recovery.

However, the COVID-19 pandemic impacted the economy so rapidly that traditional resources needed to be supplemented with higher-frequency data to support decision-making during this time. Data presented on a weekly, and even sometimes daily basis, has been necessary to track not only the health crisis, but the economic impact as well. In Missouri, this has included using a series of dashboards with essential data imperative for health and safety decisions affecting the citizens of the state.

One such dashboard is the [Show Me Strong Economic Recovery Dashboard](#). The Department of Higher Education & Workforce Development is one of the agencies contributing data to this collection of measures in the categories of employment, business, consumers, social impact, and community finance.

During these unprecedented times, data has never been so important. Data resources and users have been challenged to keep up with economic changes. With these challenges have come new innovation with data collection, such as the U.S. Census Bureau's experimental data products surveying both small businesses and households weekly to take the pulse of their condition during the pandemic. The known risk of these sources is in the possible volatility and uncertainty of data, as proper validation takes time that would slow the publication of results. More traditional, higher-quality data sets can provide benchmarking and balance to the high-frequency data. Although not all of these sources are represented in this report, it is important to recognize the value of using both types of measures to obtain a current picture of the economy and workforce, as Missouri recovers from the impacts of the pandemic.

CONTENTS

“Show Me” the facts	5
Current Trends	6
Missouri Economy Overview	7
Regional Analysis	11
Central Region.....	12
Kansas City Region.....	16
Northeast Region	20
Northwest Region	24
Ozark Region	28
South Central Region.....	32
Southeast Region.....	36
Southwest Region.....	40
St. Louis Region	44
West Central Region.....	48
Data Sources.....	52
Appendix.....	53



2020 ECONOMIC REPORT

SHOW ME

THE FACTS

- Missouri's GDP totaled \$290.9 billion in 2019 in 2012 inflation-adjusted dollars, a 2.1 percent increase over the previous year.
- From 2018 to 2019, Missouri had a 0.6 percent employment growth. From May 2010 to May 2019, Missouri added more than 228,800 jobs, increasing 8.8 percent.
- Missouri's per capita personal income was \$49,589 in 2019, up 3.2 percent from 2009.
- In May 2020, Missouri's unemployment rate was 10.1 percent due to business shutdowns and job loss caused by COVID-19.
- Missouri's labor force participation rate was 64.1, slightly higher than the nation's 63.1 percent in 2019. Nationally, as well as statewide, the number of older Americans (65+) staying in the labor force is increasing.
- The *Health Care and Social Assistance* industry employed the most people in Missouri, with more than 473,100 employees in 2019. *Retail trade* was second (304,600), and *Manufacturing* was third (277,100).
- The *Health Care and Social Assistance* industry added 7,494 jobs to the Missouri economy in 2019. *Construction* added 3,940 jobs, *Transportation Services* added 3,815, and *Manufacturing* added 3,701. The *Retail Trade* industry had the largest job decline with over 6,600 jobs.
- *Health Care, Retail Sales, Sales and Customer Service Representatives, and Computer Software and related jobs* are the most in-demand occupations based on a measure of online job advertisements.
- The Ozark Region and Kansas City Region had the highest employment growth rate in 2019 at 1.4 percent growth each.



2020 ECONOMIC REPORT

CURRENT

TRENDS

In 2019, Missouri's economy grew 2.1 points over the previous year. The Real Gross Domestic Product (GDP) growth since 2015 was 1.0 percent annually. Missouri's GDP growth has lagged behind that of the U.S. since 2010, but in 2019 Missouri was only 0.2 points below the U.S. Real GDP (2.3 percent). The Missouri economy added more than 18,000 jobs from 2018 to 2019 with the highest percentage growth identified in the *Management of Companies and Enterprises, Manufacturing, Professional, Scientific and Technical Service, and Information* industries.

In May 2020, the Missouri unemployment rate was 10.1 percent, significantly higher than previous years. This increase was a direct result of business shutdowns and job losses due to the COVID-19 pandemic. The U.S. unemployment rate was 13.3 percent in May 2020. Labor Force participation was at 64.1 percent, up from 63.8 percent in 2018.

Prior to 2020, Missouri and the nation sustained low unemployment rates matched with economic growth throughout 2019, representing a continued tight labor market. A tight labor market can result in increased wages as employers compete for workers, but it also means economic growth can be stunted, as new demand within the economy is not met due to a lack of qualified employees to spur further production. With the 2020 COVID-19 economic situation still unfolding, the weeks and months ahead may reveal new and creative industry demands as businesses reopen and adapt how they do business in light of public safety measures.

The Ozark and Kansas City Regions had the highest levels of annual employment growth in 2019. Regions with large metro areas, which tend to have economies that are more diverse, have been leading the way in employment growth in Missouri over the past five years. In 2019, the Ozark Region had 4.4 percent growth, the Kansas City Region had 3.7 percent growth, and the St. Louis Region had 2.1 percent growth matching that of Missouri overall (2.1 percent).

In this annual review of the Missouri economy, changes in gross state product, personal incomes, civilian labor force, unemployment, and employment are analyzed for the current period and more broadly over the last five to 10 years. Moreover, in this review, special attention is paid to economic regions within Missouri, their diverse workforce, and economies.

PRIOR TO 2020, MISSOURI AND THE NATION SUSTAINED LOW UNEMPLOYMENT RATES MATCHED WITH ECONOMIC GROWTH THROUGHOUT 2019, REPRESENTING A CONTINUED TIGHT LABOR MARKET.

2020 ECONOMIC REPORT

MISSOURI

ECONOMY OVERVIEW



GROSS DOMESTIC PRODUCT (GDP)

Gross Domestic Product (GDP) is the broadest measure of economic activity. This measure tracks the market value of goods and services produced within a nation or state for a particular period of time. In 2019, Missouri's GDP was \$290.9 billion (in 2012 chained dollars); this is a 2.1 percent increase over 2018. Nationally, GDP increased 2.3 percent over the same period.

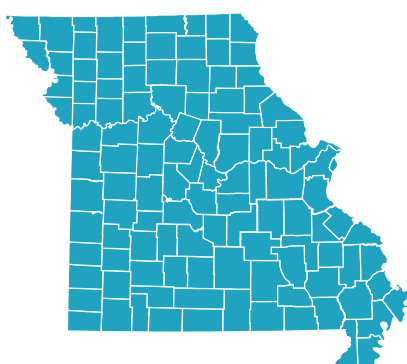
Missouri's annual growth rate continued its upward trend since 2016. In 2017, Missouri grew by 1.0 percent, then in 2018 Missouri grew by 2.4 percent. In 2019, there was another 2.1 percent GDP growth, slightly down from the previous year.

The state's GDP percent growth, from 2018 to 2019, performed better than each of the contiguous states, with the exception of Oklahoma, which had a 2.4 percent growth, and Tennessee which had a 2.2 percent growth rate.

Most industry sectors in Missouri show overall GDP growth trends from 2009 to 2019. The greatest gains in the past 10 years have been in the *Management of Companies and Enterprises* industry with 62.3 percent overall increase or 4.5 percent annual growth. Other 10-year trends include year-over-year growth in *Durable Goods Manufacturing* at 3.8 percent each year, *Professional and Business Services* at 3.0 percent annual growth, and *Utilities and Professional, Scientific and Technical Services* both at 2.8 percent annual growth.

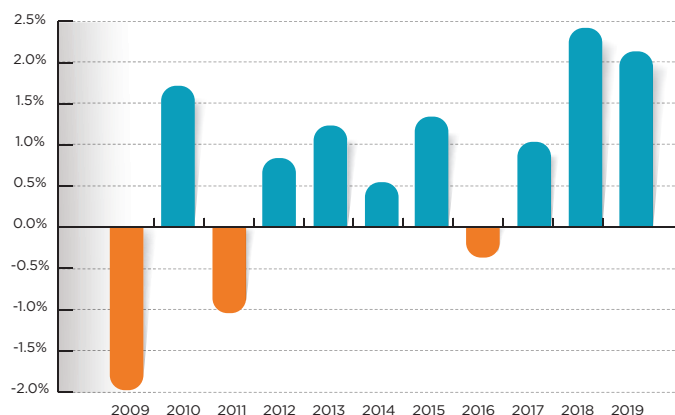
In this past year, Missouri showed higher growth in each of the aforementioned sectors plus the *Mining* sector at 5.5 percent growth from 2018 to 2019, as well as the *Agricultural* sector at 3.5 percent growth, and the *Information* sector at 2.8 percent growth.

In 2009, Missouri produced \$265.3 billion in goods and services and in 2019, Missouri produced \$290.9 billion in goods and services.



\$290.9
BILLION GDP
2.1% ↑
OVER 2018

Missouri Real Gross State Product Annual Growth Rate



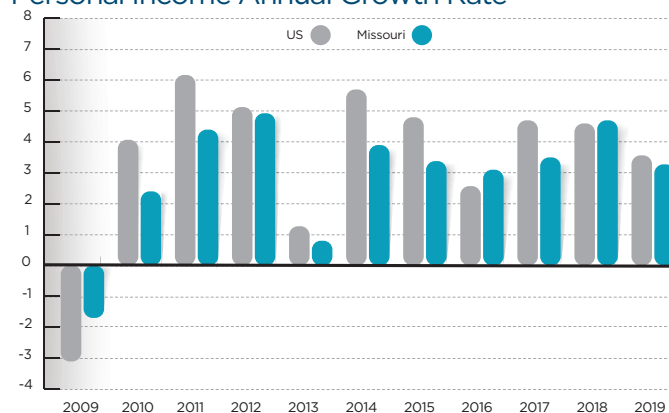
SOURCE: U.S. BUREAU OF ECONOMIC ANALYSIS, REAL GDP IN 2012 CHAINED DOLLARS

Missouri grew at an annualized 0.8 percent to equal \$25.6 billion in growth over the past 10 years or 9.7 percent GDP increase overall.

Per Capita Personal Income is a rough indicator of the economic well-being of an area's residents. Per capita income is calculated by dividing an area's total personal income by its population. The average annual income of a Missouri citizen in 2019 was \$49,589 and nationally it was \$56,663. While the state's per capita income is lower than the national average, so is the cost of living. In 2019, Missouri ranked 5th in lowest cost of living for all states.

The pace of income growth at the national level has generally been faster than Missouri's, though the state generally mirrors the nation in positive growth. From 2009 to 2019, annual growth rates for the U.S. total personal income increased an average 3.7 percent, while Missouri total personal income increased an average 3.2 percent.

Personal Income Annual Growth Rate



SOURCE: U.S. BUREAU OF ECONOMIC ANALYSIS, 2019

MISSOURI OVERVIEW

Among surrounding states, Arkansas and Illinois both increased total personal income by 3.7 percent, Tennessee increased by 3.6 percent, Iowa by 3.5 percent, Nebraska by 3.4 percent, Kansas and Kentucky both by 3.2 percent, and Oklahoma by 3.1 percent.

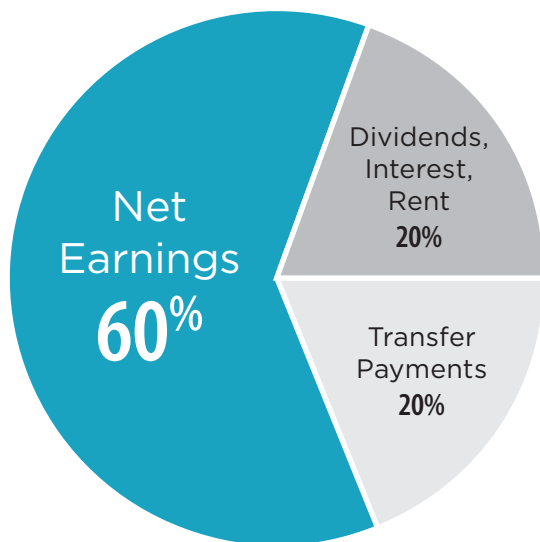
TOTAL PERSONAL INCOME

Total personal income includes the wages and salaries of workers and other income received such as dividends, interest, rent, and transfer payments. Incomes are reported before the deduction of taxes.

Twenty percent of total personal income is transfer payments. Transfer payments are monies paid out by the government to individuals through Social Security, Disability Insurance, Medicare, Unemployment Insurance compensation, Veterans benefits, Education and Training Assistance programs (Pell Grants for example), and low-income assistance benefits (which include SSI, Medicaid, CHIP, and TANF).

The federal government made over \$3.2 trillion in transfer payments in 2019 with Missouri residents receiving about \$59.7 billion in payments. Over the last 10 years, the transfer payments share of total personal income has decreased by 0.2 percentage points; nationally, there was a decrease of 0.8 percent from 17.8 percent in 2009 to 17.1 percent in 2019; and statewide, from 19.8 percent in 2009 to 19.6 percent in 2019. Social Security and Medicare make up the largest share of transfer payments.

Missouri Components of Personal Income



Component Totals: **\$304 Billion**
(IN 2012 CONSTANT \$)

SOURCE: U.S. BUREAU OF ECONOMIC ANALYSIS, 2019

UNEMPLOYMENT

The unemployment rate measures the number of persons out of work but actively seeking employment relative to the civilian labor force. As of May 2020, the nation's unemployment rate was 13.3 percent, a significant increase from former years due to the COVID-19 pandemic that caused economic downturn, business closures, and layoffs across the nation. Subsequently, Missouri's unemployment rate was 10.1 percent, representing over 303,000 Missourians out of work.

Prior to the COVID-19 pandemic, Missouri and the nation were experiencing record low unemployment numbers and a tight labor market. This meant that fewer people were looking for jobs while the economy needed more employees to meet the growing demand. However, in the coming weeks and months Missouri may see shifting industry demands as businesses reopen and adapt how they do business in light of public safety measures.

Unemployment Rate



SOURCE: U.S. BUREAU OF LABOR STATISTICS, LOCAL AREA UNEMPLOYMENT STATISTICS.

MISSOURI HAS CONSISTENTLY **OUTPERFORMED** THE NATION IN CIVILIAN LABOR FORCE PARTICIPATION RATES.
*PRIOR TO COVID-19

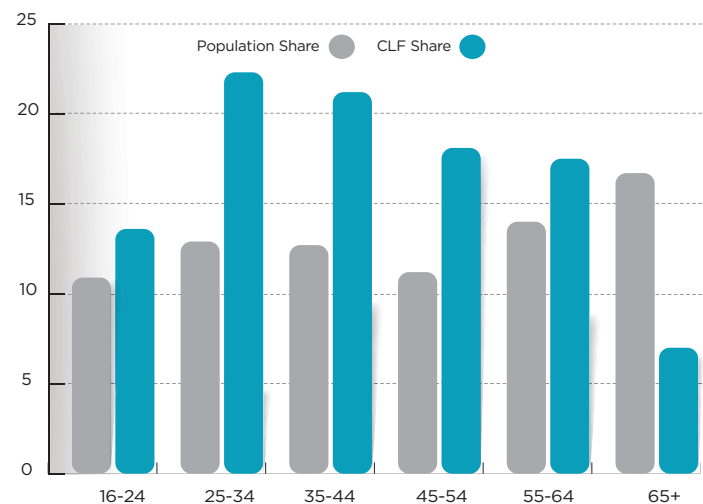
MISSOURI OVERVIEW

CIVILIAN LABOR FORCE

Civilian Labor Force is defined as the number of non-institutionalized persons—16 years and older—who are either gainfully employed or are unemployed but actively seeking work, which totals 3.1 million in Missouri for 2019. According to data from the Bureau of Labor Statistics (BLS), in 2019 the 35 to 54 age cohort comprised 23.9 percent of Missouri's population and 39.3 percent of its civilian labor force. The 65+ age cohort makes up 16.7 percent of the population and 7.0 percent of the civilian labor force. In 2009, the 65+ age cohort comprised 13.3 percent of the population and 4.4 percent of the civilian labor force.

Income growth, and by extension growth in the economy, is affected by labor force participation. The labor force participation rate (LFPR) is the ratio of the civilian labor force to the population. The national LFPR climbed to a peak of 67 percent by 1990 where it seemed to stabilize. However, since 2001 the LFPR has been falling.

Missouri Population and Labor Force by Age Cohort



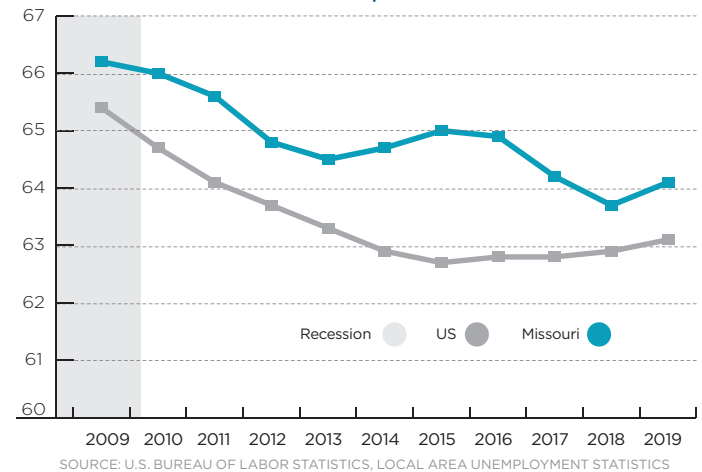
SOURCE: U.S. CENSUS BUREAU, CURRENT POPULATION SURVEY; U.S. BUREAU OF LABOR STATISTICS, LOCAL AREA UNEMPLOYMENT STATISTICS, 2019

In the last 10 years, the Missouri LFPR has averaged about 65 percent. More Missourians—as a share of the state's working-age population—participate in the labor force. In 2019, Missouri was 1.0 percent higher than the U.S. total of 63.1 percent. There is an overall downward trend from 2009 to 2019 for both Missouri and the nation. Compared to 2009 the U.S. LFPR has decreased by 2.3 percentage points and Missouri decreased by 2.1 percentage points.

In 2019, four of Missouri's neighboring states scored higher: Iowa (70.4), Nebraska (69.9), Kansas (66.7), and Illinois (64.5). Arkansas, Kentucky, Tennessee, and Oklahoma each scored lower than 64.1 percent.

From 2009 to 2019, Missouri consistently outperformed the nation in civilian labor force participation rates. In 2009, Missouri was 0.8 percentage points higher than the nation, but starting in 2014 those percent increases went from 1.8 percentage points higher to 2.3 in 2015 and 2.1 points higher in 2016. In 2017, the rate dropped back to 1.3, lower again still in 2018 to 0.8 points higher than the nation, and back up to 1.0 percentage points higher 2019.

Civilian Labor Force Participation Rates



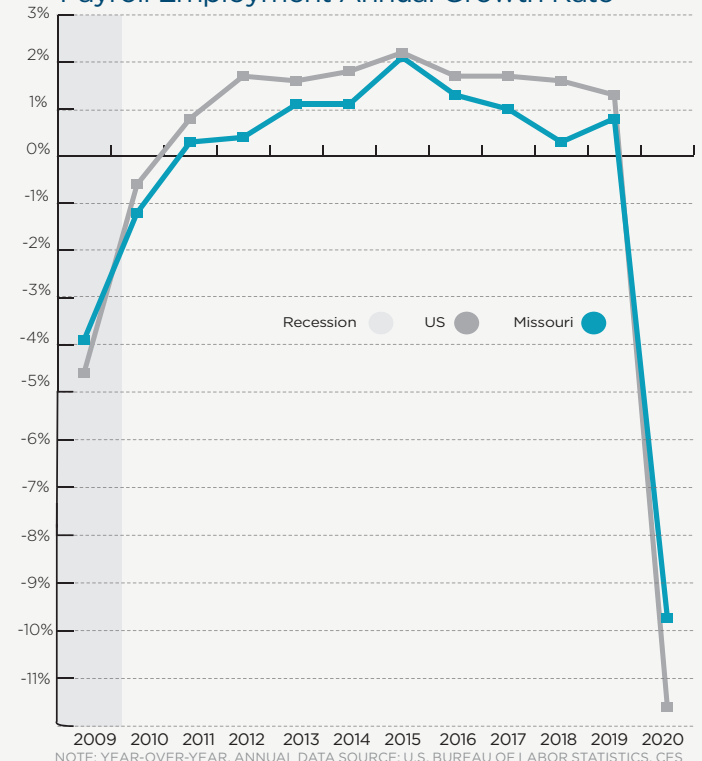
SOURCE: U.S. BUREAU OF LABOR STATISTICS, LOCAL AREA UNEMPLOYMENT STATISTICS

NONFARM PAYROLL EMPLOYMENT

Nonfarm Payroll Employment decreased 12.6 percent nationally, between January and May 2020. Prior to this year, from May 2010 to May 2019, the nation added more than 19.5 million jobs to the economy, a 15.2 percent increase. From 2018 to 2019 there was a 1.3 percent employment increase.

Statewide, Missouri's Nonfarm Payroll Employment decreased by 9.8 percent. According to the BLS local area unemployment statistics (seasonally adjusted) Missouri had approximately 315,000 fewer payroll employees from March to May 2020 due to COVID-19 business shutdowns. Prior to 2020, from May 2010 to May 2019, Missouri added more than 228,800 jobs to the state's economy, increasing 8.8 percent. From 2018 to 2019 there was a 0.6 percent employment increase.

Payroll Employment Annual Growth Rate



NOTE: YEAR-OVER-YEAR, ANNUAL DATA SOURCE: U.S. BUREAU OF LABOR STATISTICS, CES

MISSOURI OVERVIEW

EMPLOYMENT CHANGE BY INDUSTRY

Employment change by industry identifies the types of jobs being created in the state. Industries with increasing employment indicate a greater need within that sector. There are also industries that behave more cyclically, growing during economic expansion and decreasing in times of economic slowdown or contraction.

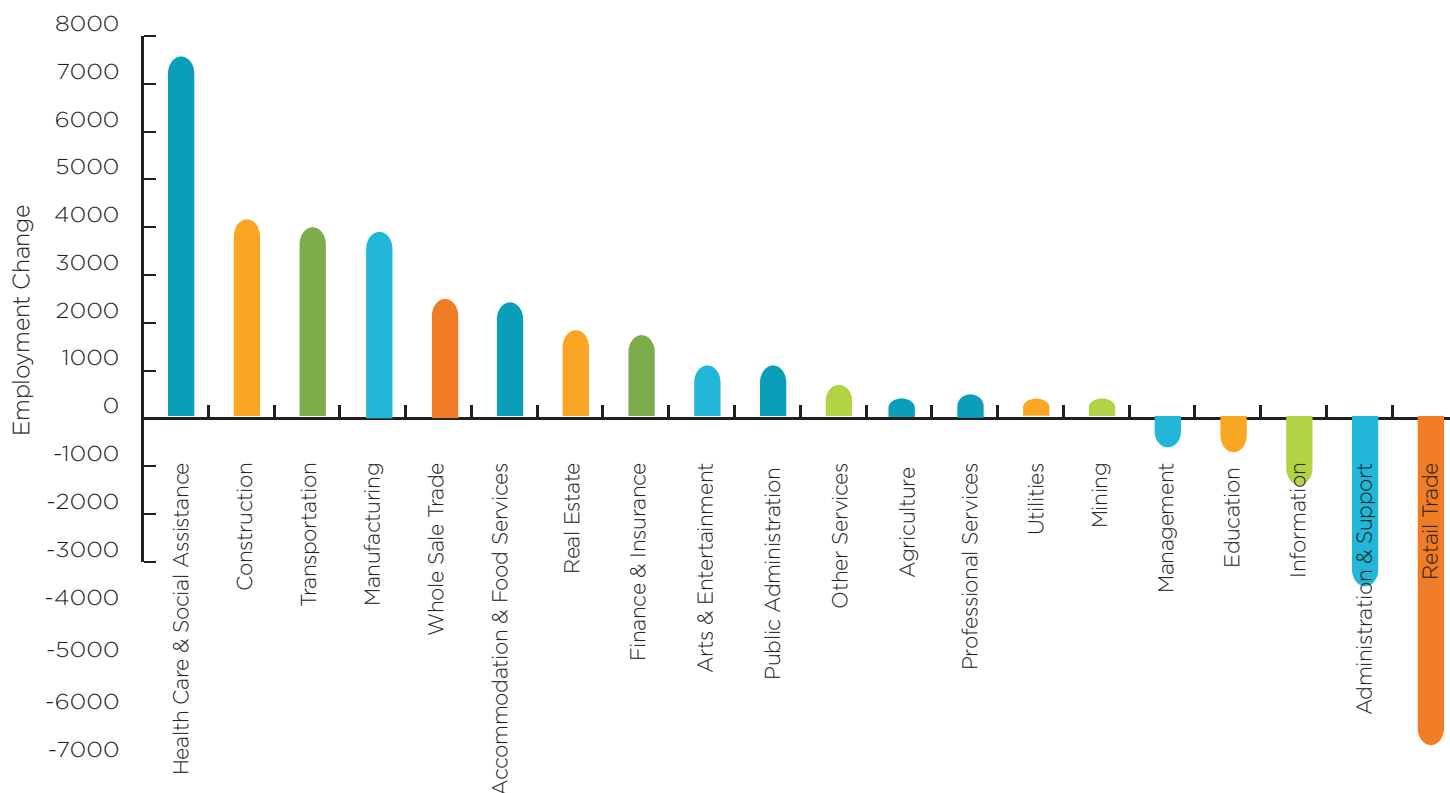
These changes are crucial; they help identify both the types of occupational job loss that is occurring and industries that are expanding or hiring.

Excluding *Public Administration* and *Other Services*, 13 out of 18 two-digit NAICS industries added jobs between 2018 and 2019. For the most part, *Mining* and *Utilities* maintained previous employment numbers with minor increases.

The largest increases for Missouri industries were in *Health Care* which added 7,494 workers; *Construction* added 3,940 workers; *Transportation* added 3,815 workers, *Manufacturing* added 3,701 workers, *Wholesale Trade* added 2,290 and *Accommodation and Food Services* added 2,232 workers.

The largest industry losses were in *Retail Trade* with 6,663 workers, *Administration and Support* with 3,204 workers, *Information* with 933 workers, *Education* with 370 workers, and *Management* lost 245 workers.

Missouri Employment Change by Industry Sector 2018-2019

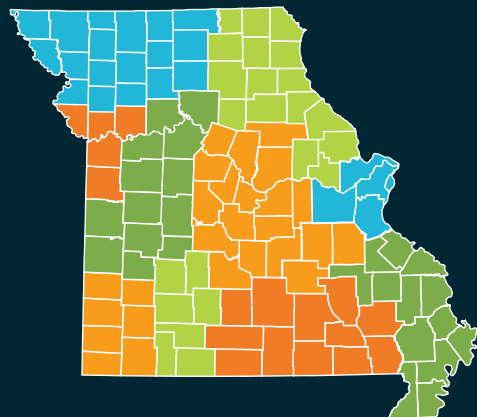


SOURCE: MERIC ANALYSIS OF THE QUARTERLY CENSUS OF EMPLOYMENT AND WAGES MICRO-DATA, 2018 TO 2019



This report was prepared by the staff of the Missouri Economic Research and Information Center (MERIC) as part of the Missouri Workforce Report. All data in this report was current at the time of publication and is subject to revision. Additional details on data sources can be found in the full report.

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2020 ECONOMIC REPORT

REGIONAL ANALYSIS

Missouri's economy is diverse and varies by geography, natural resources, and population. To better understand the state's economy, the following section analyzes the various regional economies.

The state is divided into 10 regions. These regions were developed using the Workforce Development Areas created by the Workforce Investment Act of 1998 and continued with the Workforce Innovation and Opportunity Act of 2014. For a list of the economic regions used in this analysis and the counties that make up those regions, see the Appendix.

The Missouri Regional Economic Profiles graph provides information on the total employment (size of the bubble) employment growth (horizontal axis) and average annual wage (vertical axis) within each region. Missouri's largest employing regions have higher levels of employment growth and higher wages. This is a trend occurring throughout the United States.

Kansas City and Ozark are the fastest growing regions in Missouri, both with a growth rate of 1.4 percent per year from 2015 to 2019. The Southwest Region had the second highest employment growth rate, averaging 0.8 percent employment growth per year, and the St. Louis Region was close behind at 0.7 percent annual growth.

Both the Ozark Region and Kansas City Region have had employment growth rates higher than the state average over the past six years. The Central Region averaged a steady 0.4 percent employment growth from 2015-2019, at 0.3 points below that of the state average growth.

The Northwest and South Central regions have had employment growth slow from 2017 to 2019. Each region grew from 2016 to 2017 but declined again from 2017 to 2019 by 0.3 percent and 0.1 percent respectively. The West Central region had a similar pattern, but by 2019 increased by 0.1 percent.

The Southeast Region remained at nominal growth from the previous year. The Northeast Region continued a steady growth from 2015 to 2018, but then slowed slightly by 2019 with an overall positive growth of 0.4 percent.

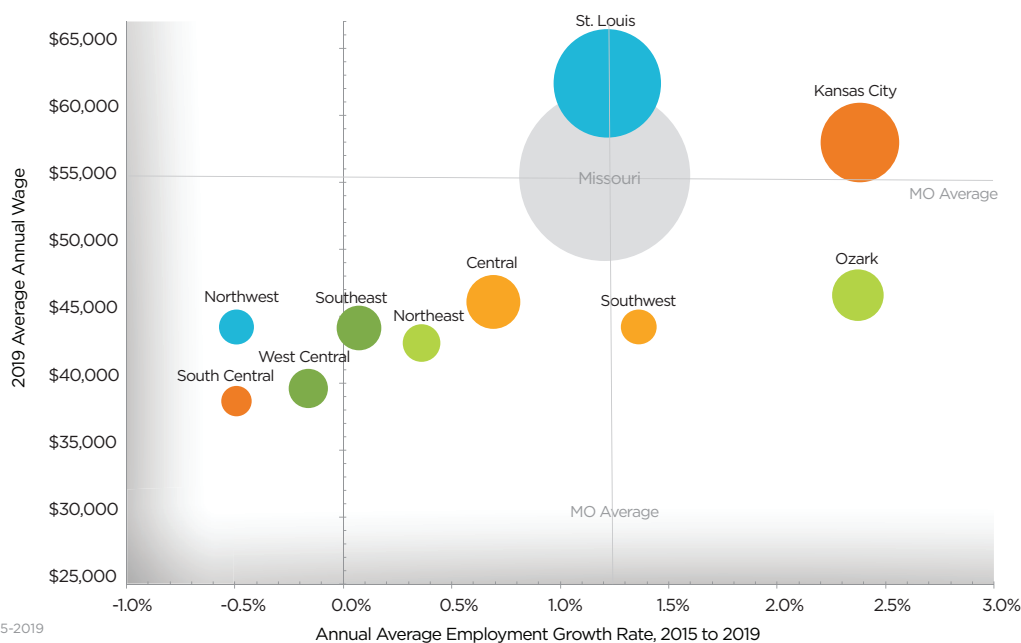
Missouri Regional Economic Profiles 2019

Bubble size represents number of employees

Central	315,755
Kansas City	603,819
Northeast	125,023
Northwest	122,826
Ozark	267,704
South Central	78,815
Southeast	160,199
Southwest	133,312
St. Louis	1,051,147
West Central	123,087

Missouri Regional Economic Profiles, 2019

Bubble size represents number of employees



2020 ECONOMIC REPORT CENTRAL REGION



The Central Region is comprised of 19 counties in the center of Missouri. This region is home to several cities including Columbia, Mexico, Rolla, Camdenton, Lebanon, and the state capital, Jefferson City.

The Central Region workforce has more than 315,700 employees, making up 11 percent of Missouri's employment. In 2019, 51 percent of the workforce was female and 49 percent was male, which matches the Missouri average.

The workforce is getting older in the Central Region, a trend happening throughout Missouri and the U.S. In 2019, 23 percent of the workforce was age 55 or older, up from 19 percent a decade earlier.

For the region, 11 percent of the workforce was non-white, compared to 17 percent for the state; 3 percent of the region's workforce was Hispanic or Latino, compared to 4 percent for Missouri.

For 6 percent of the region's population (ages 18 to 64) the primary language spoken at home is something other than English. By comparison, Missouri was at 7 percent and the U.S. population at 23 percent.

The Central Region has a slightly higher percentage of the population with a disability compared to the state and nation. For the Central Region, 14 percent of the population has a disability compared to 13 percent in Missouri and 10 percent in the U.S.

Workforce Demographics

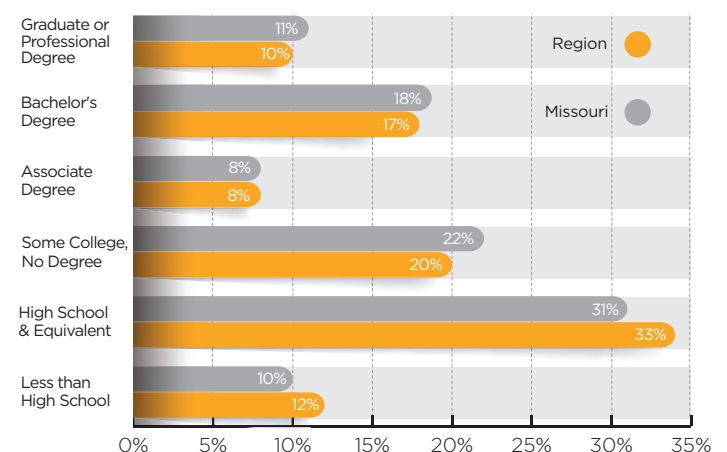
	Central MO	Missouri	Nationwide
Average monthly employment in 2019	315,755	2,981,688	150,939,000
Average Unemployment Rate in 2019	3.3%	3.3%	3.7%
Female	51%	51%	50%
Male	49%	49%	50%
Non-white	11%	17%	23%
Hispanic or Latino	3%	4%	16%
Ages 55 & older	23%	23%	23%
With disabilities (ages 18-64)	14%	13%	10%
Below Poverty Levels (ages 18-64)	17%	14%	13%
Language other than English (ages 18-64)	6%	7%	23%
Associate degree or higher: Edu Attain.	35%	37%	40%

SOURCES: CENSUS ACS 2018-5YR EST.; LEHD 2ND QUARTER; BLS QCEW NOT-SEASONALLY ADJUSTED

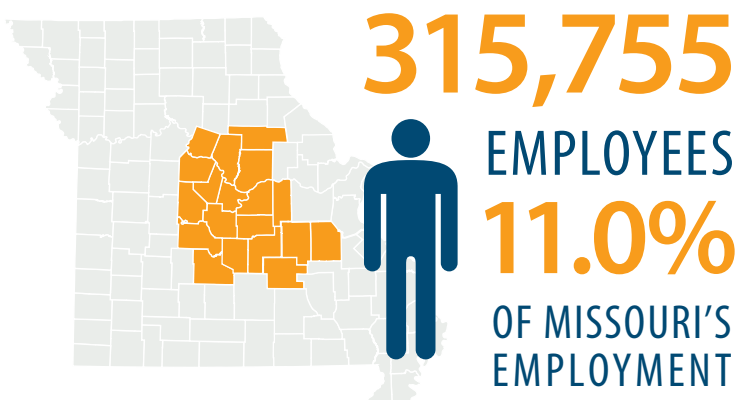
Educational attainment rates for the Central Region are slightly behind those of the state in regards to bachelor's or advanced degrees. Thirty-five percent of the region's population, age 25 and older, has an associate, bachelor's or advanced degree compared to 37 percent for the state.

The regional unemployment rate was 3.3 percent in 2019 overall. In May 2019 the rate was at 3.1 percent and as of May 2020 the preliminary rate stood at 7.6 percent, an increase of 4.5 points. This increase was a direct result of business shutdowns and job losses due to the COVID-19 pandemic.

Educational Attainment



SOURCE: US CENSUS BUREAU, ACS 2018 5-YEAR ESTIMATES

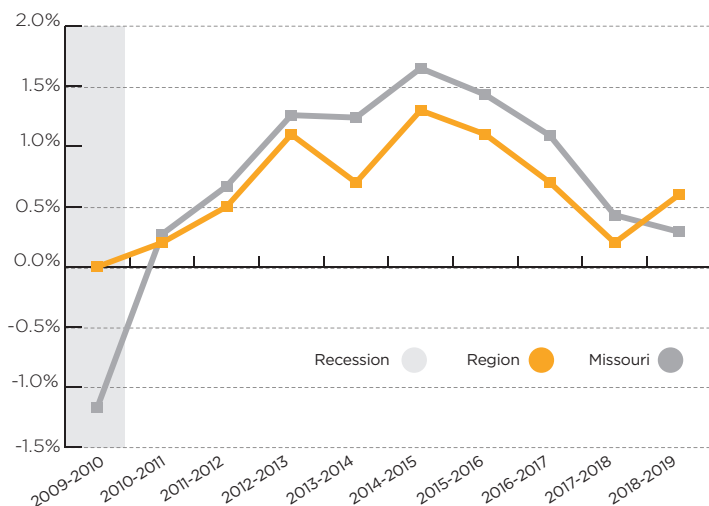


CENTRAL REGION

INDUSTRY ANALYSIS

The Central Region averaged more than 286,300 employees in June 2019. The region added 1,569 jobs from June 2018 to June 2019, growing 0.6 percent. Missouri employment increased by 0.3 percent in that time. From 2015 to 2019, the Central Region averaged 0.6 percent annual growth for an overall increase of 2.8 percent; during that same period Missouri's employment grew 3.6 percent.

Central Employment Annual Growth Rate



SOURCE: MERIC, QCEW

The *Health Care and Social Assistance* industry continues to be one of the largest employing industries in the region, showing consistent growth over the past five years, increasing over 880 jobs since 2015. *Manufacturing* added over 2,500 jobs from 2015 to 2019, which is 1.9 percent growth each year.

Accommodation and Food Services added over 1,900 jobs since 2015. *Finance and Insurance* added over 1,300 jobs at an annual growth rate of 2.8 percent. Lastly, *Administrative and Support* also increased over 1,200 jobs with an annual growth rate of 2.3 percent.

Central Region Top Employing Industries

Industry	Employment 2015	Employment 2019	Net Change	2015-2019 Empl. CAGR	2019 Annual Wages
Health Care & Social Assistance	42,515	43,399	884	0.4%	\$45,324
Retail Trade	33,804	32,551	(1,253)	-0.8%	\$28,740
Educational Services	32,549	30,752	(1,797)	-1.1%	\$50,784
Accommodation & Food Services	26,136	28,089	1,953	1.5%	\$19,332
Manufacturing	25,446	27,970	2,524	1.9%	\$46,392
Public Administration	27,425	26,576	(849)	-0.6%	\$40,680
Construction	12,050	13,343	1,293	2.1%	\$49,068
Administrative & Support	10,503	11,777	1,274	2.3%	\$32,580
Finance & Insurance	9,044	10,369	1,325	2.8%	\$68,028
Professional, Scientific & Tech. Serv.	10,360	9,158	(1,202)	-2.4%	\$57,060
Wholesale Trade	7,796	8,126	330	0.8%	\$54,504
Transportation & Warehousing	6,498	7,182	684	2.0%	\$38,256

SOURCE: LEHD-QWI, 2015-2019 2ND QUARTER

LOCATION QUOTIENT

To understand the major industries within a region, an analysis of industry concentration or clustering can be useful. The Location Quotient (LQ) describes the concentration of an industry in a geographic region, in relation to the nation, with 1.0 being the national average. Industries higher than 1.0 indicate a concentration.

The Central Region has higher concentrations in *Credit Intermediation and Related Activities*, *Building Materials and Garden Supplies*, *Motor Vehicle Parts Dealers*, and *Nursing and Residential Care Facilities*, just to name a few.

Large employers do not necessarily have a high LQ, though sometimes that is the case. The Central Region's largest employers include health care providers Capital Region Medical Center, Fulton State Hospital, Harry S. Truman VA Hospital, SSM Health St. Mary's Hospital - Jefferson City, and Lake Regional Health System.

Financial and Insurance industry employers include State Farm Insurance, Veterans United Home Loans, and Shelter Insurance. Higher concentrations of public employers are also found in this region including state government, University of Missouri, and Fort Leonard Wood U.S. Army Base.



HIGHEST 2019
LQ 2.4
GASOLINE STATIONS

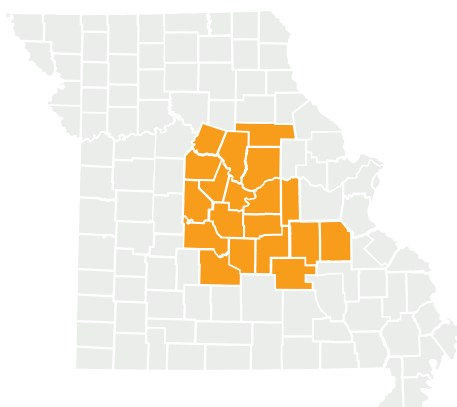
2019 Central Region Location Quotients

Industry	Employment	Location Quotient
Gasoline Stations	3,665	2.4
Credit Intermediation & Related Activities	7,059	1.6
Building Material & Garden Supply Stores	3,357	1.6
Motor Vehicle & Parts Dealers	5,025	1.5
Nursing & Residential Care Facilities	8,119	1.5
General Merchandise Stores	7,059	1.4
Sports, Hobby, Music Instrument, Book Stores	1,175	1.3
Accommodation	4,384	1.3
Food Services & Drinking Places	23,998	1.2
Heavy & Civil Engineering Construction	1,942	1.1
Machinery Manufacturing	2,033	1.1
Repair & Maintenance	2,409	1.1
Food & Beverage Stores	5,430	1.1

SOURCE: MERIC, QCEW, 2019 ANNUAL AVERAGES

CENTRAL REGION

Projected growth by industry helps to identify future employment needs for an area. Projections indicate that the largest industry growth in the Central Region will be in *Food Services and Drinking Places, Hospitals, Ambulatory Health Care Services, Social Assistance, Professional, Scientific, and Technical Services, Administrative and Support Services, and Nursing and Residential Care Facilities.*



Central Region Largest Growth Industries 2018-2028

Industry	Employment		Change	
	2018 Estimated	2028 Projected	2018-2028 Numeric	Percent
Food Services & Drinking Places	24,586	29,022	4,436	18.0%
Hospitals	15,942	18,322	2,380	14.9%
Ambulatory Health Care Services	10,571	12,169	1,598	15.1%
Social Assistance	7,412	8,840	1,428	19.3%
Professional, Scientific, & Technical Services	7,961	9,285	1,324	16.6%
Administrative & Support Services	9,307	10,432	1,125	12.1%
Nursing & Residential Care Facilities	8,348	9,391	1,043	12.5%
Nonstore Retailers	2,329	3,320	991	42.6%
Religious, Grantmaking, Civic, Professional, orgs.	7,315	8,290	975	13.3%
Management of Companies & Enterprises	4,140	4,730	590	14.3%

SOURCES: MERIC INDUSTRY PROJECTIONS

PROJECTED GROWTH BY INDUSTRY HELPS TO IDENTIFY FUTURE EMPLOYMENT NEEDS FOR AN AREA.

OCCUPATIONAL PROJECTIONS

MERIC produces occupational projections that estimate labor demand over a 10-year period. MERIC categorizes these occupations using its Now-Next-Later method to help job seekers understand the training, education, and experience requirements for various occupations.

Now jobs typically require short-term on-the-job training, little to no experience, and/or a high school diploma. Now occupations include *Cashiers, Combined Food Preparation and Service Workers, and Waiters and Waitresses* which lead the way in total openings. *Personal Care Aides, Office and Administrative Support Workers, and Taxi Drivers and Chauffeurs* are projected to be the fastest growing Now occupations over the next decade.

Next jobs typically require a non-degree certificate, associate degree, apprenticeship, some experience, or moderate- to long-term training. *Secretaries and Administrative Assistants, Cooks, and Nursing Assistants* will have the most openings for the Next category of occupations. *Loan Interviewers and Clerks, Cooks, and Veterinary Assistants and Laboratory Animal Caretakers* are the fastest growing Next occupations.

Later jobs typically require a bachelor's degree or higher. For Later occupations, *Registered Nurses, General and Operations Managers, and Accountants and Auditors* will have the most openings. *Software Developers, Loan Officers, and Securities, Commodities, and Financial Services Sales Agents* are the fastest growing Later occupations.

Central Region Fastest Growing Occupations



NOTE: OCCUPATIONS WITH NET INCREASE OF LESS THAN 50 ARE OMITTED

SOURCE: MERIC OCCUPATIONAL PROJECTIONS, 2018-2028

★ DENOTES OCCUPATIONS TOP TEN ONLINE JOB ADS FOR 2019-2020 IN THE REGION AND WITHIN THE NOW-NEXT-LATER CLASSIFICATIONS

CENTRAL REGION

Central Region Long-Term Occupational Projections by Top Openings

Occupation	2018 Estimated Employment	2028 Projected Employment	Growth Openings	Exits	Transfers	Total Openings	Median Wages
NOW							
Cashiers	8,904	8,822	-82	791	881	1,664	\$19,795 ★
Combined Food Preparation and Serving Workers	7,201	8,872	1,671	641	790	1,598	\$19,466 ★
Waiters and Waitresses	5,803	6,488	685	426	753	1,247	\$19,014
Retail Salespersons	8,704	8,409	-295	492	758	1,220	\$23,079 ★
Personal Care Aides	4,969	6,631	1,662	429	380	975	\$22,631 ★
NEXT							
Secretaries and Administrative Assistants	8,708	7,992	-716	428	507	863	\$30,213 ★
Cooks, Restaurant	3,682	4,735	1,053	223	372	700	\$22,716 ★
Nursing Assistants	4,269	4,782	513	243	264	558	\$23,924 ★
Maintenance and Repair Workers, General	3,550	3,836	286	130	228	387	\$32,130 ★
Heavy and Tractor-Trailer Truck Drivers	3,189	3,341	152	134	237	386	\$36,736 ★
LATER							
Registered Nurses	6,865	7,905	1,040	205	189	498	\$61,756 ★
General and Operations Managers	4,696	5,158	462	103	324	473	\$66,241 ★
Accountants and Auditors	2,331	2,498	167	68	157	242	\$60,640
Secondary School Teachers	2,963	2,987	24	83	126	211	\$44,498
Child, Family, and School Social Workers	1,721	1,827	106	52	121	184	\$35,746

SOURCE: MERIC OCCUPATIONAL PROJECTIONS 2018-2028

★ DENOTES OCCUPATIONS IN THE TOP TEN FOR 2019-2020 ON-LINE JOB ADS IN THE REGION & WITHIN THE NOW-NEXT-LATER CLASSIFICATION

DEPARTMENT OF
HIGHER EDUCATION &
WORKFORCE DEVELOPMENT

For more information, visit
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This report was prepared by the staff of the Missouri Economic Research and Information Center (MERIC) as part of the Missouri Workforce Report. All data in this report was current at the time of publication and is subject to revision. Additional details on data sources can be found in the full report.

This workforce solution was funded by a grant awarded by the U.S. Department of Labor's Employment and Training Administration. The solution was created by the grantee and does not necessarily reflect the official position of the U.S. Department of Labor. The Department of Labor makes no guarantees, warranties, or assurances of any kind, express or implied, with respect to such information, including any information on linked sites and including, but not limited to, accuracy of the information or its completeness, timeliness, usefulness, adequacy, continued availability, or ownership.

2020 ECONOMIC REPORT KANSAS CITY REGION



DEPARTMENT OF
HIGHER EDUCATION &
WORKFORCE DEVELOPMENT

The Kansas City Region is comprised of five counties in the west central part of Missouri. The region is home to several cities including Kansas City and Independence.

The Kansas City Region workforce has more than 603,800 employees, making up 20 percent of Missouri's employment. In 2019, 50 percent of the workforce was female and 50 percent was male.

The workforce is getting older in the Kansas City Region, a trend happening throughout Missouri and the U.S. In 2019, 22 percent of the workforce was age 55 or older, up from 18 percent a decade earlier.

For the region, 20 percent of the workforce was non-white, compared to 17 percent for the state; 7 percent of the region's workforce was Hispanic or Latino, compared to 4 percent for Missouri.

For 8 percent of the region's population (ages 18 to 64) the primary language spoken at home is something other than English. By comparison, Missouri was at 7 percent and the U.S. population at 23 percent.

The Kansas City Region has a lower percentage of the population with a disability compared to the state and nation. For the region, 11 percent of the population has a disability compared to 13 percent in Missouri and 10 percent in the U.S.

Workforce Demographics

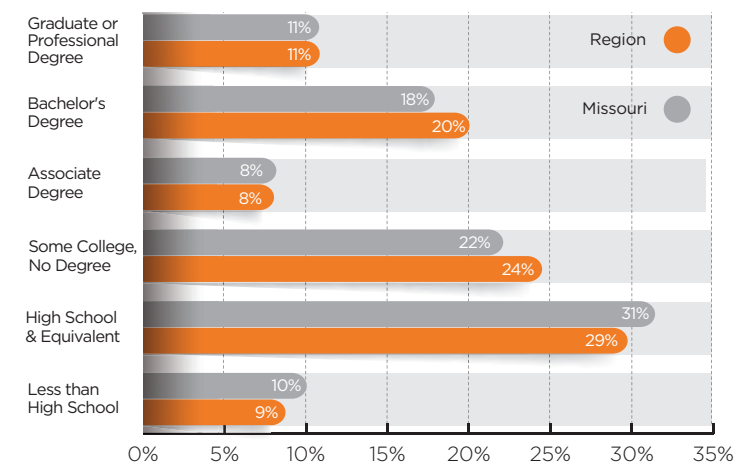
	K.C. Region	Missouri	Nationwide
Average monthly employment in 2019	603,819	2,981,688	150,939,000
Average Unemployment Rate in 2019	3.4%	3.3%	3.7%
Female	50%	51%	50%
Male	50%	49%	50%
Non-white	20%	17%	23%
Hispanic or Latino	7%	4%	16%
Ages 55 & older	22%	23%	23%
With disabilities (ages 18-64)	11%	13%	10%
Below Poverty Levels (ages 18-64)	11%	14%	13%
Language other than English (ages 18-64)	8%	7%	23%
Associate degree or higher: Edu Attain.	39%	37%	40%

SOURCES: CENSUS ACS 2018-5YR EST.; LEHD 2ND QUARTER; BLS QCEW NOT-SEASONALLY ADJUSTED

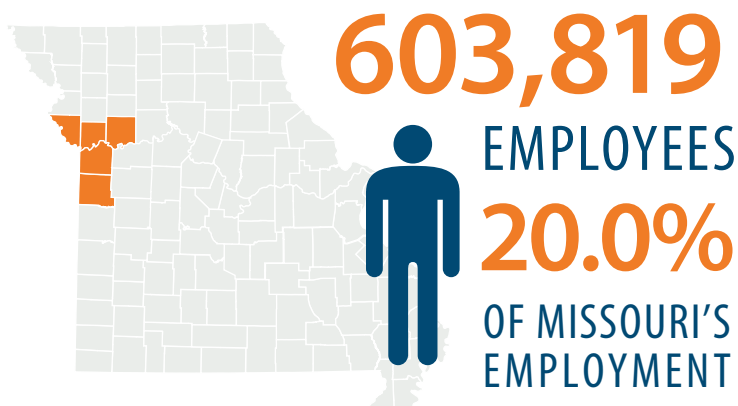
Educational attainment rates for the Kansas City Region are slightly higher than those of the state in regards to bachelor's or advanced degrees. Thirty-nine percent of the region's population, age 25 and older, has an associate, bachelor's or advanced degree compared to 37 percent for the state.

The regional unemployment rate was 3.4 percent in 2019 overall. In May 2019 the rate was at 3.0 percent and as of May 2020 the preliminary rate stood at 11.4 percent, an increase of 8.4 points. This increase was a direct result of business shutdowns and job losses due to the COVID-19 pandemic.

Educational Attainment



SOURCE: US CENSUS BUREAU, ACS 2018 5-YEAR ESTIMATES

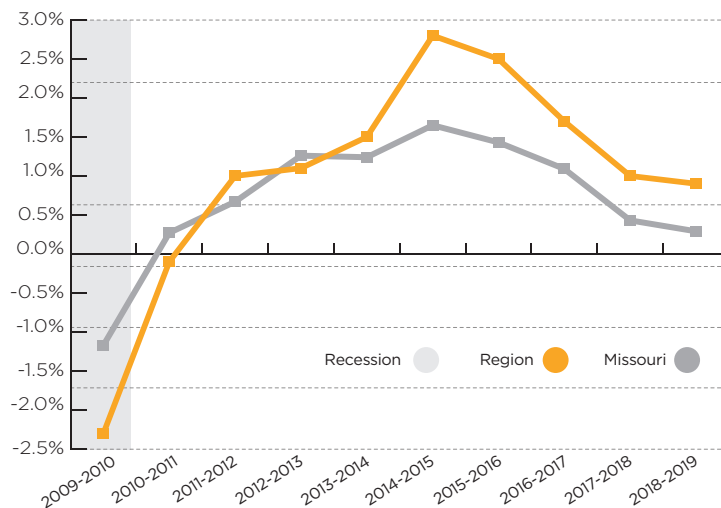


KANSAS CITY REGION

INDUSTRY ANALYSIS

The Kansas City Region averaged over 565,500 employees in June 2019. The region added 5,245 jobs from June 2018 to June 2019, growing 0.9 percent. Missouri employment increased by 0.3 percent in that time. From 2015 to 2019, the Kansas City Region averaged 1.2 percent annual growth for an overall increase of 6 percent; during that same period Missouri's employment grew 3.6 percent.

Kansas City Employment Annual Growth Rate



SOURCE: MERIC, QCEW

The *Health Care and Social Assistance* industry continues to lead the way in job growth for the region, showing consistent growth over the past five years, increasing 7,021 jobs since 2015. *Retail Trade* added 2,593 jobs from 2015 to 2019, an increase of 0.8 percent annually for the region.

Accommodation and Food Services grew by 1.6 percent annually, adding over 4,200 jobs; *Professional, Scientific and Technical Services* had the greatest gains since 2015, adding over 11,300 jobs. Lastly, *Manufacturing* grew by 1.5 percent annually since 2015.

Kansas City Region Top Employing Industries

Industry	Employment 2015	Employment 2019	Net Change	2015-2019 Empl. CAGR	2019 Annual Wages
Health Care & Social Assistance	76,951	83,972	7,021	1.8%	\$54,240
Retail Trade	60,033	62,626	2,593	0.8%	\$31,968
Accommodation & Food Services	52,896	52,166	4,270	1.6%	\$22,488
Professional, Science & Tech. Servs.	42,198	42,198	11,316	4.9%	\$85,752
Manufacturing	41,446	41,446	3,297	1.5%	\$63,072
Educational Services	39,872	39,872	(409)	-0.2%	\$50,640
Administrative Support & Waste	31,816	32,835	1,019	0.6%	\$38,268
Construction	25,427	29,089	3,662	2.7%	\$65,376
Finance & Insurance	28,320	28,484	164	0.1%	\$80,412
Wholesale Trade	23,510	26,066	2,556	2.1%	\$69,792
Transportation & Warehousing	22,489	23,828	1,339	1.2%	\$47,964
Other Services (ex. Publ. Adm.)	15,788	16,726	938	1.2%	\$40,932

SOURCE: LEHD-QWI, 2015-2019 2ND QUARTER

LOCATION QUOTIENT

To understand the major industries within a region, an analysis of industry concentration or clustering can be useful. The Location Quotient (LQ) describes the concentration of an industry in a geographic region, in relation to the nation, with 1.0 being the national average. Industries higher than 1.0 indicate a concentration.

The Kansas City Region has higher concentrations in *Data Processing and Hosting*, *Transportation Equipment Manufacturing*, *Support Activities for Transportation*, and *Paper Manufacturing*, just to name a few.

Large employers do not necessarily have a high LQ, though sometimes that is the case. Kansas City Region's large employers include the health care providers Children's Mercy Hospital, St. Luke's Hospital, North Kansas City Hospital, St. Luke's Medical Plaza, and the Research Medical Center.

Technology companies, such as Cerner and DST Systems, and manufacturers Ford and Honeywell, are in the region. Engineering firm Burns & McDonnell, pharmaceutical consulting Catalent, and Hallmark corporate headquarters, are in Kansas City. In addition, there is University of Missouri-Kansas City as a major public employer as well as the Federal Reserve Bank of Kansas City.



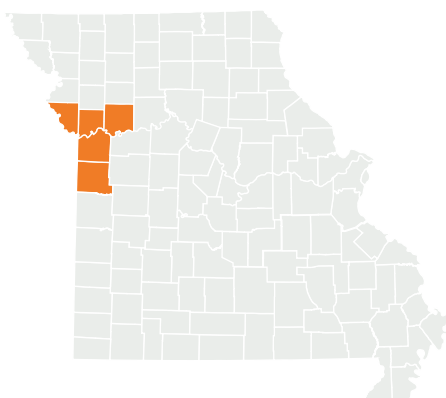
2019 Kansas City Region Location Quotients

Industry	Employment	Location Quotient
Transportation Equipment Manufacturing	12,021	1.8
Data Processing, Hosting, & Related Services	2,373	1.8
Paper Manufacturing	2,285	1.7
Support Activities for Transportation	4,226	1.5
Broadcasting, except Internet	1,462	1.5
Performing Arts & Spectator Sports	2,797	1.4
Professional & Technical Services	49,700	1.4
Insurance Carriers & Related Activities	12,432	1.4
Management of Companies & Enterprises	11,413	1.3
Printing & Related Support Activities	1,971	1.2
Gasoline Stations	4,190	1.2
Plastics & Rubber Products Manufacturing	3,240	1.2
Truck Transportation	6,742	1.2
Building Material & Garden Supply Stores	5,689	1.2
Electronic Markets, Agents, & Brokers	2,292	1.2

SOURCE: MERIC, QCEW, 2019 ANNUAL AVERAGES

KANSAS CITY REGION

Projected growth by industry helps to identify future employment needs for an area. Projections indicate that the largest growth industries in the Kansas City Region will continue to be *Professional, Scientific, and Technical Services*, *Ambulatory Health Care Services*, *Social Assistance*, *Hospitals*, *Specialty Trade Contractors*, and *Food and Beverage Stores*.



Kansas City Region Largest Growth Industries 2018-2028

Industry	Employment		Change	
	2018 Estimated	2028 Projected	2018-2028 Numeric	2018-2028 Percent
Professional, Scientific, & Technical Services	50,577	59,666	9,089	18.0%
Ambulatory Health Care Services	23,448	28,496	5,048	21.5%
Social Assistance	16,233	20,431	4,198	25.9%
Hospitals	30,818	33,264	2,446	7.9%
Specialty Trade Contractors	17,918	19,356	1,438	8.0%
Food & Beverage Stores	11,930	12,947	1,017	8.5%
Merchant Wholesalers, Durable Goods	12,862	13,442	580	4.5%
Health & Personal Care Stores	3,840	4,232	392	10.2%
Gasoline Stations	4,237	4,597	360	8.5%
Federal Government, Excluding Post Office	15,190	15,534	344	2.3%

SOURCES: MERIC INDUSTRY PROJECTIONS

PROJECTED GROWTH BY INDUSTRY HELPS TO IDENTIFY FUTURE EMPLOYMENT NEEDS FOR AN AREA.

OCCUPATIONAL PROJECTIONS

MERIC produces occupational projections that estimate labor demand over a 10-year period. MERIC categorizes these occupations using its Now-Next-Later method to help job seekers understand the training, education, and experience requirements for various occupations.

Now jobs typically require short-term on-the-job training, little to no experience, and/or a high school diploma. Now occupations include *Combined Food Preparation and Serving Workers*, *Cashiers*, and *Waiters and Waitresses* which lead the way in total openings. Health care related positions, including *Personal Care Aides* and *Home Health Aides* and are projected to be the fastest growing Now occupations over the next decade.

Next jobs typically require a non-degree certificate, associate degree, apprenticeship, some experience, or moderate- to long-term training. *Secretaries and Administrative Assistants*, *Assemblers and Fabricators*, and *Heavy and Tractor-Trailer Truck Drivers* will have the most openings for the Next category of occupations. *Phlebotomists*, *Physical Therapists Assistants*, and *Respiratory Therapists* are the fastest growing Next occupations.

Later jobs typically require a bachelor's degree or higher. For Later occupations, *General and Operations Managers* and *Registered Nurses* will have the most openings. *Information Security Analysts*, *Software Developers*, and *Nurse Practitioners* are the fastest growing Later occupations.

Kansas City Region Fastest Growing Occupations



NOTE: OCCUPATIONS WITH NET INCREASE OF LESS THAN 50 ARE OMITTED

SOURCE: MERIC OCCUPATIONAL PROJECTIONS, 2018-2028

★ DENOTES OCCUPATIONS TOP TEN ONLINE JOB ADS FOR 2019-2020 IN THE REGION AND WITHIN THE NOW-NEXT-LATER CLASSIFICATIONS

KANSAS CITY REGION

Kansas City Region Long-Term Occupational Projections by Top Openings

Occupation	2018 Estimated Employment	2028 Projected Employment	Growth Openings	Exits	Transfers	Total Openings	Median Wages
NOW							
Combined Food Preparation and Serving Workers	14,274	16,687	2,413	1,234	1,522	2,997	\$19,988 ★
Cashiers	15,272	15,378	106	1,368	1,523	2,902	\$22,030 ★
Waiters and Waitresses	10,966	11,597	631	783	1,382	2,228	\$19,115 ★
Retail Salespersons	14,794	14,254	-540	835	1,287	2,068	\$23,255 ★
Personal Care Aides	9,282	12,703	3,421	812	720	1,874	\$22,429
NEXT							
Secretaries and Administrative Assistants	13,447	12,169	-1,278	656	777	1,305	\$36,905 ★
Assemblers and Fabricators, All Other	10,233	8,965	-1,268	393	725	991	\$37,803
Heavy and Tractor-Trailer Truck Drivers	8,104	8,400	296	340	598	968	\$44,484 ★
Cooks, Restaurant	4,902	5,930	1,028	288	479	870	\$28,132 ★
Nursing Assistants	6,701	7,316	615	377	409	848	\$26,348
LATER							
General and Operations Managers	10,860	11,567	707	235	739	1,045	\$84,041 ★
Registered Nurses	14,576	16,463	1,887	431	398	1,018	\$66,614 ★
Software Developers, Applications	6,268	8,349	2,081	101	413	722	\$88,153 ★
Accountants and Auditors	6,782	7,289	507	198	457	706	\$62,185 ★
Secondary School Teachers	5,792	5,891	99	162	247	419	\$50,609

SOURCE: MERIC OCCUPATIONAL PROJECTIONS 2018-2028

★ DENOTES OCCUPATIONS IN THE TOP TEN FOR 2019-2020 ON-LINE JOB ADS IN THE REGION & WITHIN THE NOW-NEXT-LATER CLASSIFICATION

DEPARTMENT OF
HIGHER EDUCATION &
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2020 ECONOMIC REPORT NORTHEAST REGION

DEPARTMENT OF
HIGHER EDUCATION &
WORKFORCE DEVELOPMENT

The Northeast Region is comprised of 16 counties in northeastern Missouri. This region is home to several cities including Kirksville, Hannibal, Moberly, and Warrenton.

The Northeast Region workforce has more than 125,000 employees, making up 4 percent of Missouri's employment. In 2019, 51 percent of the workforce was female and 49 percent was male, which matches the Missouri average.

The workforce is getting older in the Northeast Region, a trend happening throughout Missouri and the U.S. In 2019, 26 percent of the workforce was age 55 or older, up from 21 percent a decade earlier.

For the region, 7 percent of the workforce was non-white, compared to 17 percent for the state; 2 percent of the region's workforce was Hispanic or Latino, compared to 4 percent for Missouri.

For 3 percent of the region's population (ages 18 to 64) the primary language spoken at home is something other than English. By comparison, Missouri was at 7 percent and the U.S. population at 23 percent.

The Northeast Region has the same percentage of the population with a disability compared to the state and higher than the nation. For the region, 13 percent of the population has a disability compared to 13 percent in Missouri and 10 percent in the U.S.

Workforce Demographics

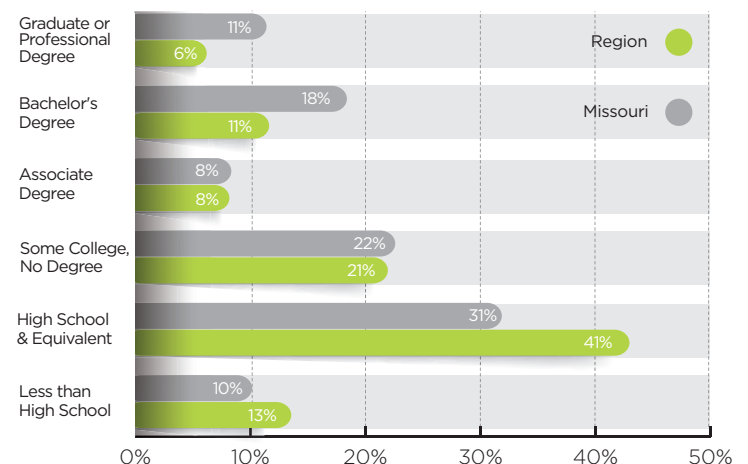
	NE Region	Missouri	Nationwide
Average monthly employment in 2019	125,023	2,981,688	150,939,000
Average Unemployment Rate in 2019	3.4%	3.3%	3.7%
Female	51%	51%	50%
Male	49%	49%	50%
Non-white	7%	17%	23%
Hispanic or Latino	2%	4%	16%
Ages 55 and older	26%	23%	23%
With disabilities (ages 18-64)	13%	13%	10%
Below Poverty Levels ages (18-64)	15%	14%	13%
Language other than English (ages 18-64)	3%	7%	23%
Associates degree or higher: Edu. Attain.	25%	37%	40%

SOURCES: CENSUS ACS 2019-5YR EST.; LEHD 2ND QUARTER; BLS QCEW NOT-SEASONALLY ADJUSTED

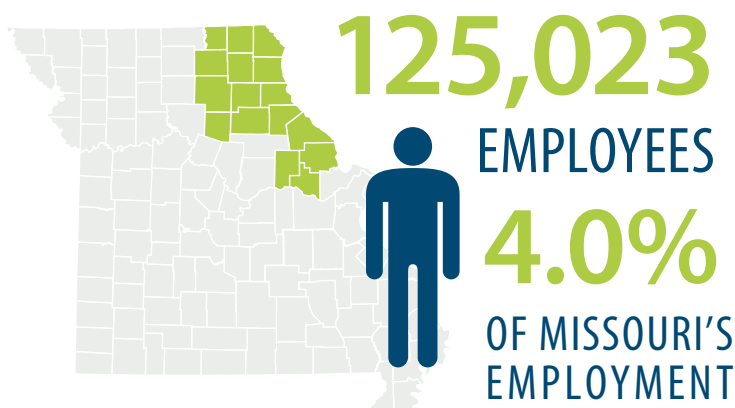
Educational attainment rates for the Northeast Region are lower than those of the state in regards to bachelor's or advanced degrees. Twenty-five percent of the region's population, age 25 and older, has an associate, bachelor's or advanced degree compared to 37 percent for the state.

The regional unemployment rate was 3.4 percent in 2019 overall. In May 2019 the rate was at 3.0 percent and as of May 2020 the preliminary rate stood at 8.3 percent, an increase of 5.3 points. This increase was a direct result of business shutdowns and job losses due to the COVID-19 pandemic.

Educational Attainment



SOURCE: US CENSUS BUREAU, ACS 2018 5-YEAR ESTIMATES



NORTHEAST REGION

INDUSTRY ANALYSIS

The Northeast Region averaged over 80,100 employees in June 2019. The region lost 850 jobs from June 2018 to June 2019, at a -1.0 percent growth rate. Missouri employment increased by 0.3 percent in that time. From 2015 to 2019, the Northeast Region averaged 0.1 percent annual growth for an overall increase of 0.6 percent; during that same period Missouri's employment grew 3.6 percent.

Northeast Employment Annual Growth Rate



SOURCE: MERIC, QCEW

The *Manufacturing* industry continues to lead the way in job growth for the region, showing consistent growth over the past five years, increasing over 1,600 jobs since 2015. *Health Care* employment dropped slightly, losing over 300 jobs from 2015 to 2019, but has maintained a workforce of over 12,000.

The *Educational Services* industry lost over 700 jobs since 2015; *Accommodation and Food Services* grew 0.7 percent annually adding 211 new jobs in the past 5 years. *Construction* had an increase of 297 jobs since 2015 and the *Transportation* sector added over 550 new jobs, at an annual growth of 3.6 percent.

Northeast Region Top Employing Industries

Industry	Employment		2015-2019		2019 Annual Wages
	2015	2019	Net Change	Empl. CAGR	
Health Care & Social Assistance	12,544	12,227	(317)	-0.5%	\$37,692
Manufacturing	9,482	11,142	1,660	3.3%	\$50,112
Retail Trade	9,906	9,737	(169)	-0.3%	\$26,124
Educational Services	10,420	9,674	(746)	-1.5%	\$47,232
Accommodation & Food Services	6,356	6,567	211	0.7%	\$15,948
Public Administration	4,680	4,444	(236)	-1.0%	\$35,316
Construction	4,137	4,434	297	1.4%	\$48,636
Transportation & Warehousing	2,856	3,407	551	3.6%	\$41,712
Wholesale Trade	3,658	3,170	(488)	-2.8%	\$54,144
Finance & Insurance	2,336	2,457	121	1.0%	\$46,524
Other Services (except Public Admin)	2,096	1,952	(144)	-1.4%	\$28,116
Prof., Scientific, & Tech. Services	1,575	1,865	290	3.4%	\$50,196

SOURCE: LEHD-QWI, 2015-2019 2ND QUARTER

LOCATION QUOTIENT

To understand the major industries within a region, an analysis of industry concentration or clustering can be useful. The Location Quotient (LQ) describes the concentration of an industry in a geographic region, in relation to the nation, with 1.0 being the national average. Industries higher than 1.0 indicate a concentration.

The Northeast Region has higher concentrations in *Manufacturing*, *Crop and Animal Production*, *Truck Transportation*, and *Nursing and Residential Care*, just to name a few.

Large employers do not necessarily have a high LQ, though sometimes that is the case. The Northeast Region's large employers include Hannibal Regional Hospital, Moberly Regional Medical Center, and the Northeast Regional Medical Center.

Top employing Food Manufacturers include General Mills, Kraft Foods, Heartland Dairy, and Con Agra Foods. Saf-holland USA, Continental Casting, and Watlow are big *Fabricated Metal and Machinery Manufacturers*, and Truman State University is a large public sector employer for the region.



**HIGHEST 2019
LQ 4.0
GASOLINE STATIONS**

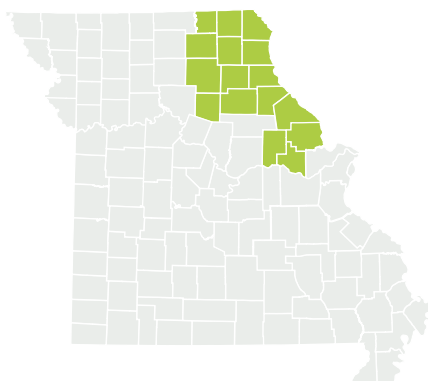
2019 Northeast Region Location Quotients

Industry	Employment	Location Quotient
Gasoline Stations	1,871	4.0
Nonmetallic Mineral Product Manufacturing	655	3.2
Animal Production & Aquaculture	250	1.9
Crop Production	507	1.9
Heavy & Civil Engineering Construction	982	1.9
Truck Transportation	1,385	1.8
Nursing & Residential Care Facilities	3,047	1.8
General Merchandise Stores	2,623	1.8
Building Material & Garden Supply Stores	1,102	1.7
Machinery Manufacturing	872	1.6
Credit Intermediation & Related Activities	1,843	1.4
Transportation Equipment Manufacturing	1,003	1.2
Motor Vehicle & Parts Dealers	1,173	1.2
Merchant Wholesalers, Nondurable Goods	1,235	1.2
Repair & Maintenance	750	1.1
Wood Product Manufacturing	215	1.1

SOURCE: MERIC, QCEW, 2019 ANNUAL AVERAGES

NORTHEAST REGION

Projected growth by industry helps to identify future employment needs for an area. Projections indicate that the largest growth industries in the Northeast Region will be the *Ambulatory Health Care Services*, *Nonstore Retailers*, *Merchant Wholesalers (Nondurable Goods)*, *Crop Production*, *Food Services and Drinking Places*, and *General Merchandise Stores*.



Northeast Region Largest Growth Industries 2018-2028

Industry	Employment		Change	
	2018 Estimated	2028 Projected	2018-2028 Numeric	Percent
Ambulatory Health Care Services	2,770	3,413	643	23.2%
Nonstore Retailers	941	1,476	535	56.8%
Merchant Wholesalers, Nondurable Goods	1,441	1,790	349	24.2%
Crop Production	2,001	2,338	337	16.8%
Food Services & Drinking Places	6,056	6,381	325	5.4%
General Merchandise Stores	2,725	3,032	307	11.3%
Specialty Trade Contractors	1,963	2,242	279	14.2%
Machinery Manufacturing	1,128	1,340	212	18.8%
Social Assistance	2,478	2,677	199	8.0%
Building Material & Garden Equip. & Supplies	1,129	1,302	173	15.3%

SOURCES: MERIC INDUSTRY PROJECTIONS

PROJECTED GROWTH BY INDUSTRY HELPS TO IDENTIFY FUTURE EMPLOYMENT NEEDS FOR AN AREA.

OCCUPATIONAL PROJECTIONS

MERIC produces occupational projections that estimate labor demand over a 10-year period. MERIC categorizes these occupations using its Now-Next-Later method to help job seekers understand the training, education, and experience requirements for various occupations.

Now jobs typically require short-term on-the-job training, little to no experience, and/or a high school diploma. Now occupations include *Cashiers*, *Retail Salespersons*, and *Combined Food Preparation and Serving Workers* which lead the way in total openings. Other positions include *Personal Care Aides*, *Cleaners of Vehicles and Equipment*, and *Customer Service Representatives* which are projected to be the fastest growing Now occupations over the next decade.

Next jobs typically require a non-degree certificate, associate degree, apprenticeship, some experience, or moderate- to long-term training. *Heavy and Tractor-Trailer Truck Drivers*, *Secretaries and Administrative Assistants*, and *Nursing Assistants* will have the most openings for the Next category of occupations. *Pharmacy Technicians*; *Heating, Air Conditioning, and Refrigeration Mechanics*; and *Cooks* are the fastest growing Next occupations.

Later jobs typically require a bachelor's degree or higher. For Later occupations *General and Operations Managers*, *Registered Nurses*, and *Secondary School Teachers* will have the most openings. *Pharmacists*, *Health Specialties Teachers*, and *Healthcare Social Workers* are the fastest growing Later occupations.

Northeast Region Fastest Growing Occupations



NOTE: OCCUPATIONS WITH NET INCREASE OF LESS THAN 50 ARE OMITTED

SOURCE: MERIC OCCUPATIONAL PROJECTIONS, 2018-2028

★ DENOTES OCCUPATIONS TOP TEN ONLINE JOB ADS FOR 2019-2020 IN THE REGION AND WITHIN THE NOW-NEXT-LATER CLASSIFICATIONS

NORTHEAST REGION

Northeast Region Long-Term Occupational Projections by Top Openings

Occupation	2018 Estimated Employment	2028 Projected Employment	Growth Openings	Exits	Transfers	Total Openings	Median Wages
NOW							
Cashiers	2,566	2,662	96	233	260	503	\$19,361 ★
Retail Salespersons	2,330	2,475	145	138	213	365	\$22,662 ★
Combined Food Preparation and Serving Workers	1,530	1,693	163	128	158	302	\$19,030 ★
Personal Care Aides	1,545	1,791	246	123	109	257	\$21,753 ★
Waiters and Waitresses	1,046	1,068	22	73	130	205	\$21,007
NEXT							
Heavy and Tractor-Trailer Truck Drivers	2,179	2,350	171	93	164	274	\$41,110 ★
Secretaries and Administrative Assistants	2,696	2,433	-263	131	156	261	\$31,234
Nursing Assistants	1,525	1,472	-53	81	87	163	\$22,398
Cooks, Restaurant	837	978	141	48	80	142	\$21,727 ★
First-Line Supervisors of Retail Sales Workers	1,075	1,103	28	38	82	123	\$36,332 ★
LATER							
General and Operations Managers	1,370	1,463	93	30	93	132	\$60,523 ★
Registered Nurses	1,481	1,605	124	43	40	95	\$55,953 ★
Secondary School Teachers	1,169	1,166	-3	32	49	81	\$39,896
Accountants and Auditors	355	371	16	10	24	36	\$53,326
Elementary School Teachers	456	455	-1	14	19	33	\$43,349

SOURCE: MERIC OCCUPATIONAL PROJECTIONS 2018-2028

★ DENOTES OCCUPATIONS IN THE TOP TEN FOR 2019-2020 ON-LINE JOB ADS IN THE REGION & WITHIN THE NOW-NEXT-LATER CLASSIFICATION

DEPARTMENT OF
HIGHER EDUCATION &
WORKFORCE DEVELOPMENT

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This report was prepared by the staff of the Missouri Economic Research and Information Center (MERIC) as part of the Missouri Workforce Report. All data in this report was current at the time of publication and is subject to revision. Additional details on data sources can be found in the full report.

This workforce solution was funded by a grant awarded by the U.S. Department of Labor's Employment and Training Administration. The solution was created by the grantee and does not necessarily reflect the official position of the U.S. Department of Labor. The Department of Labor makes no guarantees, warranties, or assurances of any kind, express or implied, with respect to such information, including any information on linked sites and including, but not limited to, accuracy of the information or its completeness, timeliness, usefulness, adequacy, continued availability, or ownership.

2020 ECONOMIC REPORT NORTHWEST REGION

DEPARTMENT OF
HIGHER EDUCATION &
WORKFORCE DEVELOPMENT

The Northwest Region is comprised of 18 counties in the northwest corner of Missouri. The region is home to several cities including St. Joseph, Chillicothe, Trenton, and Maryville.

The Northwest Region workforce has more than 122,800 employees, making up 4 percent of Missouri's employment. In 2019, 51 percent of the workforce was female and 49 percent was male, which matches the Missouri average.

The workforce is getting older in the Northwest Region, a trend happening throughout Missouri and the U.S. In 2019, 25 percent of the workforce was age 55 or older, up from 20 percent a decade earlier.

For the region, 8 percent of the workforce was non-white, compared to 17 percent for the state; 4 percent of the region's workforce was Hispanic or Latino, compared to 4 percent for Missouri.

For 5 percent of the region's population (ages 18 to 64) the primary language spoken at home is something other than English. By comparison, Missouri was at 7 percent and the U.S. population at 23 percent.

The Northwest Region has the same percentage of the population with a disability compared to the state and higher than the nation. For the region, 13 percent of the population has a disability compared to 13 percent in Missouri and 10 percent in the U.S.

Workforce Demographics

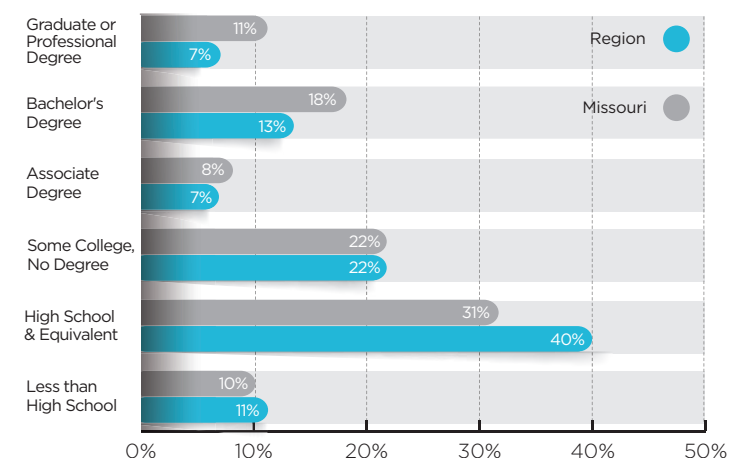
	NW Region	Missouri	Nationwide
Average monthly employment in 2019	122,826	2,981,688	150,939,000
Average Unemployment Rate in 2019	3.1%	3.3%	3.7%
Female	51%	51%	50%
Male	49%	49%	50%
Non-white	8%	17%	23%
Hispanic or Latino	4%	4%	16%
Ages 55 and older	25%	23%	23%
With disabilities (ages 18-64)	13%	13%	10%
Below Poverty Levels (ages 18-64)	15%	14%	13%
Language other than English (ages 18-64)	5%	7%	23%
Associate degree or higher: Edu Attain.	27%	37%	40%

SOURCES: CENSUS ACS 2018-5YR EST.; LEHD 2ND QUARTER; BLS QCEW NOT-SEASONALLY ADJUSTED

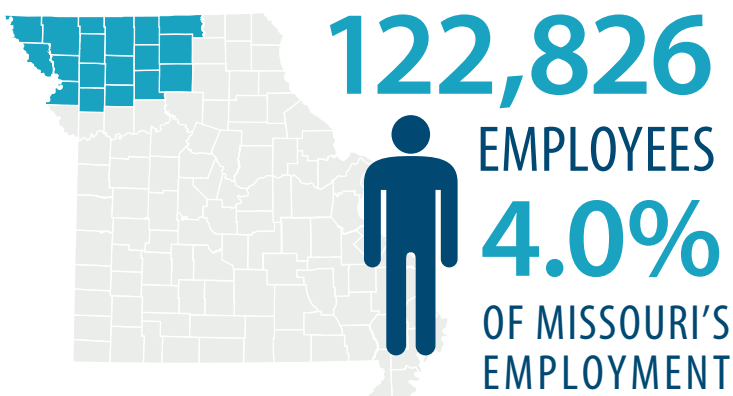
Educational attainment rates for the Northwest Region are lower than those of the state in regards to bachelor's or advanced degrees. Twenty-seven percent of the region's population, age 25 and older, has an associate, bachelor's or advanced degree compared to 37 percent for the state.

The regional unemployment rate was 3.1 percent in 2019 overall. In May 2019 the rate was at 2.8 percent and as of May 2020 the preliminary rate stood at 6.3 percent, an increase of 3.5 points. This increase was a direct result of business shutdowns and job losses due to the COVID-19 pandemic.

Educational Attainment



SOURCE: US CENSUS BUREAU, ACS 2018 5-YEAR ESTIMATES

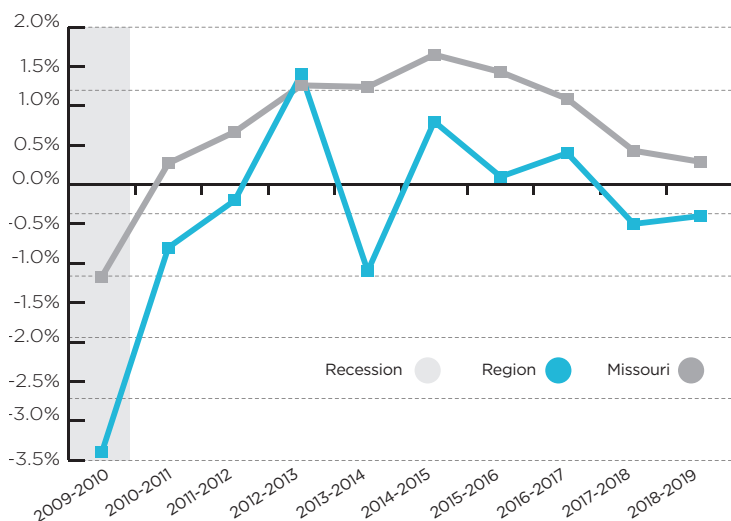


NORTHWEST REGION

INDUSTRY ANALYSIS

The Northwest Region averaged over 95,200 employees in June 2019. The region lost 401 jobs from June 2018 to June 2019, resulting in a -0.4 percent growth rate. Missouri employment increased by 0.3 percent in that time. From 2015 to 2019, the Northwest Region averaged 0.1 percent annual loss for an overall decrease of 0.7 percent; during that same period Missouri's employment grew 3.6 percent.

Northwest Employment Annual Growth Rate



SOURCE: MERIC, QCEW

The *Health Care* industry added 338 jobs from 2015 to 2019, growing at a modest 0.4 percent a year. *Manufacturing* gained 349 jobs, and continues to be the largest employing industry in the region and maintains a workforce of over 17,100.

The *Professional, Scientific, and Technical Services* industry grew by 479 jobs in the region since 2015. *Administration Support and Waste Management* lost 1,553 jobs since 2015. Other losses occurred in *Wholesale Trade* (-440 jobs), *Accommodation and Food Services* (-266 jobs), *Educational Services* (-264 jobs) and *Public Administration* (-251 jobs).

Northwest Region Top Employing Industries

Industry	Employment 2015	Employment 2019	Net Change	2015-2019 Empl. CAGR	2019 Annual Wages
Manufacturing	16,800	17,149	349	0.4%	\$55,692
Health Care & Social Assistance	15,734	16,072	338	0.4%	\$48,864
Retail Trade	10,345	10,353	8	0.0%	\$28,104
Educational Services	9,610	9,346	(264)	-0.6%	\$43,128
Accommodation & Food Services	7,112	6,846	(266)	-0.8%	\$16,776
Public Administration	5,817	5,566	(251)	-0.9%	\$34,992
Construction	3,885	4,101	216	1.1%	\$61,416
Admin Support & Waste	5,440	3,887	(1,553)	-6.5%	\$30,612
Wholesale Trade	3,875	3,435	(440)	-2.4%	\$56,148
Finance and Insurance	3,335	3,125	(210)	-1.3%	\$55,104
Prof., Scientific, & Technical Services	2,344	2,823	479	3.8%	\$67,380
Transportation & Warehousing	2,372	2,528	156	1.3%	\$42,720

SOURCE: LEHD-QWI, 2015-2019 2ND QUARTER

LOCATION QUOTIENT

To understand the major industries within a region, an analysis of industry concentration or clustering can be useful. The Location Quotient (LQ) describes the concentration of an industry in a geographic region, in relation to the nation, with 1.0 being the national average. Industries higher than 1.0 indicate a concentration.

The Northeast Region has higher concentrations in several manufacturing sectors including *Food*, *Fabricated Metals*, and *Chemical Manufacturing*; also *Building Materials and Garden Supplies*, *Transit and Ground Passenger Transportation*, and *Merchandise Wholesalers*, to name a few.

Large employers do not necessarily have a high LQ, though sometimes that is the case. The Northeast Region's largest employers are in manufacturing and health care. Boehringer Ingelheim and Teva Animal Health Division employ for *Chemical Manufacturing*; Farmland Foods, Conagra Foods, and Hillshire Brands employ for *Food Manufacturing*; and Johnson Controls and Hillard Inc., employ for *Machinery and Other Misc. Manufacturing*.

The health care industry's large employer for the region is Heartland Regional Medical Center. In addition, Northwest Missouri State University and Western Missouri Correctional Center are also large employers.



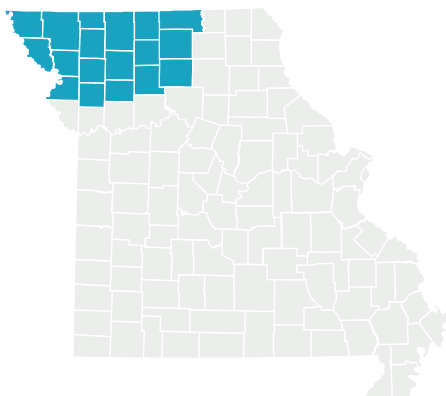
2019 Northwest Region Location Quotients

Industry	Employment	Location Quotient
Food Manufacturing	4,985	5.1
Fabricated Metal Product Manufacturing	3,055	3.5
Chemical Manufacturing	1,522	3.0
Gasoline Stations	1,674	3.0
Building Material & Garden Supply Stores	1,233	1.6
General Merchandise Stores	2,748	1.5
Merchant Wholesalers, Nondurable Goods	1,848	1.4
Utilities	404	1.2
Transit & Ground Passenger Transportation	356	1.2
Motor Vehicle and Parts Dealers	1,416	1.2
Nursing & Residential Care Facilities	2,327	1.2
Animal Production & Aquaculture	171	1.1
Repair & Maintenance	852	1.1
Social Assistance	2,521	1.1

SOURCE: MERIC, QCEW, 2019 ANNUAL AVERAGES

NORTHWEST REGION

Projected growth by industry helps to identify future employment needs for an area. Projections indicate that the largest growth industries in the Northwest Region will be the *Ambulatory Health Care Services, Social Assistance, Machinery Manufacturing, Hospitals, and Professional, Scientific, and Technical Services*.



Northwest Region Largest Growth Industries 2018-2028

Industry	Employment		Change	
	2018 Estimated	2028 Projected	2018-2028 Numeric	2018-2028 Percent
Ambulatory Health Care Services	3,300	3,765	465	14.1%
Social Assistance	3,159	3,621	462	14.6%
Machinery Manufacturing	1,639	1,981	342	20.8%
Hospitals	4,849	5,187	338	7.0%
Professional, Scientific, & Technical Services	2,198	2,431	233	10.6%
Specialty Trade Contractors	1,819	1,935	116	6.4%
Merchant Wholesalers, Durable Goods	1,173	1,280	107	9.1%
Warehousing & Storage	480	580	100	20.9%
Nonstore Retailers	186	278	92	49.5%
Plastics & Rubber Products Manufacturing	322	401	79	24.5%

SOURCES: MERIC INDUSTRY PROJECTIONS

PROJECTED GROWTH BY INDUSTRY HELPS TO IDENTIFY FUTURE EMPLOYMENT NEEDS FOR AN AREA.

OCCUPATIONAL PROJECTIONS

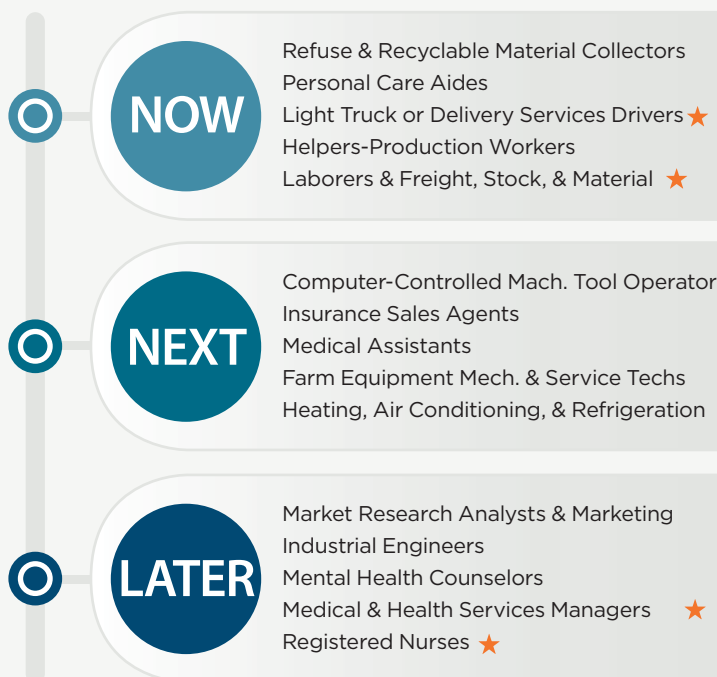
MERIC produces occupational projections that estimate labor demand over a 10-year period. MERIC categorizes these occupations using its Now-Next-Later method to help job seekers understand the training, education, and experience requirements for various occupations.

Now jobs typically require short-term on-the-job training, little to no experience, and/or a high school diploma. Now occupations include *Retail Salespersons, Cashiers, and Personal Care Aides* which lead the way in total openings. *Refuse and Recyclable Material Collectors, Personal Care Aides, and Light Truck or Delivery Services Drivers* are projected to be the fastest growing Now occupations over the next decade.

Next jobs typically require a non-degree certificate, associate degree, apprenticeship, some experience, or moderate- to long-term training. *Secretaries and Administrative Assistants, Nursing Assistants, and Cooks* will have the most openings for the Next category of occupations. *Computer-Controlled Machine Tool Operators, Insurance Sales Agents, and Medical Assistants* are the fastest growing Next occupations.

Later jobs typically require a bachelor's degree or higher. For Later occupations *Registered Nurses, General and Operations Managers, and Secondary School Teachers* will have the most openings. *Market Research Analysts, Industrial Engineers, and Substance Abuse, Behavioral Disorder and Mental Health Counselors* are the fastest growing Later occupations.

Northwest Region Fastest Growing Occupations



NOTE: OCCUPATIONS WITH NET INCREASE OF LESS THAN 50 ARE OMITTED

SOURCE: MERIC OCCUPATIONAL PROJECTIONS, 2018-2028

★ DENOTES OCCUPATIONS TOP TEN ONLINE JOB ADS FOR 2019-2020 IN THE REGION AND WITHIN THE NOW-NEXT-LATER CLASSIFICATIONS

NORTHWEST REGION

Northwest Region Long-Term Occupational Projections by Top Openings

Occupation	2018 Estimated Employment	2028 Projected Employment	Growth Openings	Exits	Transfers	Total Openings	Median Wages
NOW							
Retail Salespersons	4,049	3,872	-177	228	351	561	\$22,236 ★
Cashiers	2,887	2,822	-65	255	284	533	\$19,992 ★
Personal Care Aides	3,077	3,653	576	249	220	527	\$22,938
Combined Food Preparation and Serving Workers	1,952	2,039	87	159	196	364	\$19,406 ★
Laborers and Freight, Stock, and Material Movers	1,661	1,740	79	77	159	244	\$26,956 ★
NEXT							
Secretaries and Administrative Assistants	2,824	2,491	-333	136	161	264	\$29,175
Nursing Assistants	1,559	1,476	-83	82	88	162	\$22,981 ★
Cooks, Restaurant	1,003	1,097	94	56	93	158	\$21,491 ★
Heavy and Tractor-Trailer Truck Drivers	1,307	1,341	34	54	96	153	\$39,535 ★
Maintenance and Repair Workers, General	1,566	1,554	-12	55	96	150	\$35,574 ★
LATER							
Registered Nurses	2,191	2,379	188	63	59	141	\$59,358 ★
General and Operations Managers	1,368	1,406	38	29	91	124	\$68,391 ★
Secondary School Teachers	1,706	1,633	-73	46	71	110	\$43,927
Elementary School Teachers	1,084	1,035	-49	33	45	73	\$38,956
Substance Abuse, Behavioral, & Mental Health	409	465	56	14	31	51	\$31,081

SOURCE: MERIC OCCUPATIONAL PROJECTIONS 2018-2028

★ DENOTES OCCUPATIONS IN THE TOP TEN FOR 2019-2020 ON-LINE JOB ADS IN THE REGION & WITHIN THE NOW-NEXT-LATER CLASSIFICATION

DEPARTMENT OF
HIGHER EDUCATION &
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2020 ECONOMIC REPORT

OZARK

REGION



DEPARTMENT OF
HIGHER EDUCATION &
WORKFORCE DEVELOPMENT

The Ozark Region is comprised of 7 counties in the southwest quadrant of Missouri. This region is home to several cities including Springfield, Branson, Nixa, and Marshfield.

The Ozark Region workforce has more than 267,700 employees, making up 9 percent of Missouri's employment. In 2019, 50 percent of the workforce was female and 50 percent was male.

The workforce is getting older in the Ozark Region, a trend happening throughout Missouri and the U.S. In 2019, 22 percent of the workforce was age 55 or older, up from 18 percent a decade earlier.

For the region, 8 percent of the workforce was non-white, compared to 17 percent for the state; 4 percent of the region's workforce was Hispanic or Latino, matching the overall state average of 4 percent.

For 5 percent of the region's population (ages 18 to 64) the primary language spoken at home is something other than English. By comparison, Missouri was at 7 percent and the U.S. population at 23 percent.

The Ozark Region has a higher percentage of the population with a disability compared to the state and nation. For the Ozark Region, 14 percent of the population has a disability compared to 13 percent in Missouri and 10 percent in the U.S.

Workforce Demographics

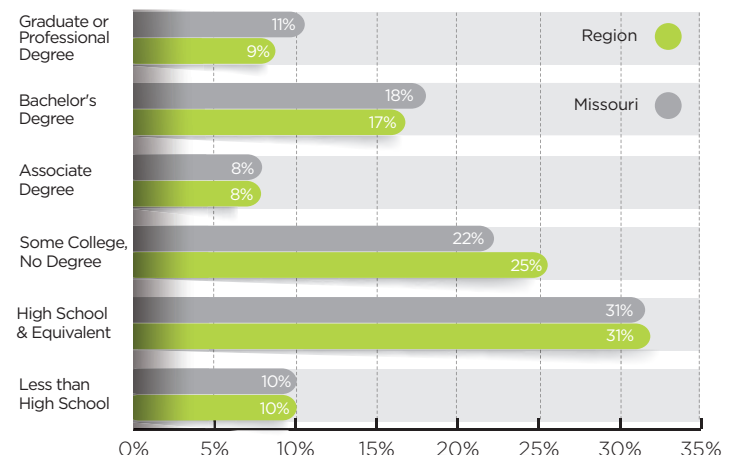
	Ozark MO	Missouri	Nationwide
Average monthly employment in 2019	267,704	2,981,688	150,939,000
Average Unemployment Rate in 2019	3.2%	3.3%	3.7%
Female	50%	51%	50%
Male	50%	49%	50%
Non-white	8%	17%	23%
Hispanic or Latino	4%	4%	16%
Ages 55 and older	22%	23%	23%
With disabilities (ages 18-64)	14%	13%	10%
Below Federal Poverty Levels (ages 18-64)	17%	14%	13%
Language other than English (ages 18-64)	5%	7%	23%
Associate degree or higher: Edu Attain.	34%	37%	40%

SOURCES: CENSUS ACS 2018-5YR EST.; LEHD 2ND QUARTER; BLS QCEW NOT-SEASONALLY ADJUSTED

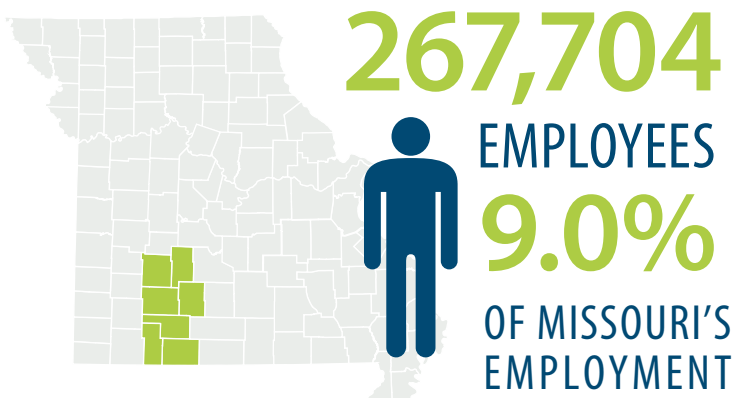
Educational attainment rates for the Ozark Region are slightly behind those of the state in regards to bachelor's or advanced degrees. Thirty-four percent of the region's population, age 25 and older, has an associate, bachelor's or advanced degree compared to 37 percent for the state.

The regional unemployment rate was 3.2 percent in 2019 overall. In May 2019 the rate was at 2.7 percent and as of May 2020 the preliminary rate stood at 10.1 percent, an increase of 7.4 points. This increase was a direct result of business shutdowns and job losses due to the COVID-19 pandemic.

Educational Attainment



SOURCE: US CENSUS BUREAU, ACS 2018 5-YEAR ESTIMATES

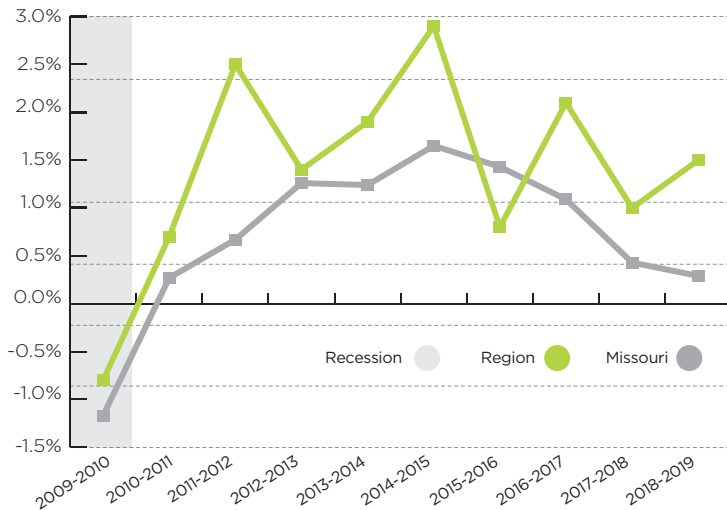


OZARK REGION

INDUSTRY ANALYSIS

The Ozark Region averaged over 247,900 employees in June 2019. The region added 3,731 jobs from June 2018 to June 2019, growing 1.5 percent. Missouri employment increased by 0.3 percent in that time. From 2015 to 2019, the Ozark Region averaged 1.2 percent annual growth for an overall increase of 6 percent; during that same period Missouri's employment grew 3.6 percent.

Ozark Employment Annual Growth Rate



SOURCE: MERIC, QCEW

Health Care and Social Assistance is the largest employing industry in the region, showing consistent growth over the past five years. *Retail Trade* lost over 500 jobs. *Accommodation and Food Services* added over 3,000 jobs from 2015 to 2019, an increase of nearly 2.2 percent each year for the region.

The *Manufacturing* industry gained over 2,000 jobs at a 2.6 percent annually growth and the *Transportation* industry added over 2,100 jobs. Other industries with growth of over 1,000 jobs since 2015 include *Wholesale Trade*, *Transportation and Warehousing*, *Construction*, and *Professional, Scientific, and Technical Services*.

Ozark Region Top Employing Industries

Industry	Employment 2015	Employment 2019	Net Change	2015-2019 Empl. CAGR	2019 Annual Wages
Health Care & Social Assistance	38,894	43,449	4,555	2.2%	\$50,496
Retail Trade	30,120	29,550	(570)	-0.4%	\$30,420
Accommodation & Food Services	26,170	29,193	3,023	2.2%	\$21,108
Educational Services	21,699	21,091	(608)	-0.6%	\$49,776
Manufacturing	15,459	17,550	2,091	2.6%	\$47,580
Admin Support & Waste	14,699	14,446	(253)	-0.3%	\$36,444
Wholesale Trade	10,983	12,967	1,984	3.4%	\$58,956
Transportation & Warehousing	10,325	11,927	1,602	2.9%	\$47,328
Construction	10,230	11,519	1,289	2.4%	\$46,668
Prof., Scientific, & Technical Services	9,201	10,635	1,434	2.9%	\$57,840
Finance & Insurance	8,818	9,209	391	0.9%	\$55,776
Other Services (except Public Admin)	7,124	6,949	(175)	-0.5%	\$34,680

SOURCE: LEHD-QWI, 2015-2019 2ND QUARTER

LOCATION QUOTIENT

To understand the major industries within a region, an analysis of industry concentration or clustering can be useful. The Location Quotient (LQ) describes the concentration of an industry in a geographic region, in relation to the nation, with 1.0 being the national average. Industries higher than 1.0 indicate a concentration.

The Ozark Region has higher concentrations in *Truck Transportation*, *Performing Arts and Spectator Sports*, *Accommodation*, *Telecommunications*, *Sports, Hobby, Music and Book Stores*, and *Hospitals*, just to name a few. Large employers do not necessarily have a high LQ, though sometimes that is the case. The Ozark Region's largest employers include health care providers CoxHealth, Mercy Hospital and Skaggs Community Health Center.

Other large employers include Prime, Inc. in *Truck Transportation*, Kraft Food and Loren Cook in *Manufacturing*, and Jack Henry & Associates in the *Professional, Scientific, and Technical Services* industry. In addition, Chase Bank Cardservices, Hotels.com, T-Mobile call centers, Bass Pro Shops, and O'Reilly Automotive corporate headquarters are large employers. Missouri State University is a major public sector employer in the region as is Ozarks Technical Community College.



HIGHEST 2019
LQ 2.9
TRUCK TRANSPORTATION

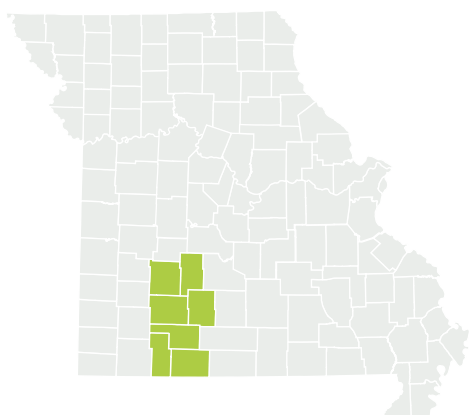
2019 Ozark Region Location Quotients

Industry	Employment	Location Quotient
Truck Transportation	7,430	2.9
Performing Arts & Spectator Sports	1,710	2.0
Accommodation	6,780	2.0
Sports, Hobby, Music Instrument, Book Stores	1,752	1.9
Telecommunications	2,223	1.9
Hospitals	15,565	1.8
Gasoline Stations	2,361	1.5
General Merchandise Stores	7,498	1.5
Building Material & Garden Supply Stores	3,035	1.4
Merchant Wholesalers, Durable Goods	7,413	1.4
Miscellaneous Store Retailers	1,772	1.3
Nursing & Residential Care Facilities	6,844	1.2
Repair & Maintenance	2,726	1.2
Amusements, Gambling, & Recreation	3,447	1.2
Fabricated Metal Product Manufacturing	2,911	1.2
Food Services & Drinking Places	23,491	1.2
Motor Vehicle & Parts Dealers	3,950	1.2
Credit Intermediation & Related Activities	5,130	1.2

SOURCE: MERIC, QCEW, 2019 ANNUAL AVERAGES

OZARK REGION

Projected growth by industry helps to identify future employment needs for an area. Projections indicate that the largest growth industries in the Ozark Region will be *Hospitals, Ambulatory Health Care Services, Administrative and Support Services, Educational Services, Specialty Trade Contractors, and Management of Companies and Enterprises*.



Ozark Region Largest Growth Industries 2018-2028

Industry	Employment		Change	
	2018 Estimated	2028 Projected	2018-2028 Numeric	Percent
Hospitals	18,063	24,068	6,005	33.2%
Ambulatory Health Care Services	11,141	14,684	3,543	31.8%
Administrative & Support Services	12,402	15,543	3,141	25.3%
Educational Services	19,375	21,544	2,169	11.2%
Specialty Trade Contractors	6,957	8,552	1,595	22.9%
Management of Companies & Enterprises	3,904	5,164	1,260	32.3%
Local Government, Excluding Ed. & Hospitals	8,633	9,347	714	8.3%
General Merchandise Stores	7,431	8,133	702	9.4%
Professional, Scientific, & Technical Services	9,613	10,290	677	7.0%
Religious, Grantmaking, Civic, Professional, Orgs.	4,623	5,244	621	13.4%

SOURCES: MERIC INDUSTRY PROJECTIONS

PROJECTED GROWTH BY INDUSTRY HELPS TO IDENTIFY FUTURE EMPLOYMENT NEEDS FOR AN AREA.

OCCUPATIONAL PROJECTIONS

MERIC produces occupational projections that estimate labor demand over a 10-year period. MERIC categorizes these occupations using its Now-Next-Later method to help job seekers understand the training, education, and experience requirements for various occupations.

Now jobs typically require short-term on-the-job training, little to no experience, and/or a high school diploma. Now occupations include *Combined Food Preparation and Serving Workers, Cashiers, and Retail Salespersons* which lead the way in total openings. *Personal Care Aides, Taxi Drivers and Chauffeurs, and Combined Food Preparation and Serving Workers* are projected to be the fastest growing Now occupations over the next decade.

Next jobs typically require a non-degree certificate, associate degree, apprenticeship, some experience, or moderate- to long-term training. *Heavy and Tractor-Trailer Truck Drivers, Secretaries and Administrative Assistants, and Nursing Assistants* will have the most openings for the Next category of occupations. *Phlebotomists, Medical Assistants, and Nursing Assistants* are the fastest growing Next occupations.

Later jobs typically require a bachelor's degree or higher. For Later occupations, *Registered Nurses, General and Operations Managers, and Elementary School Teachers* will have the most openings. *Nurse Practitioners, Substance Abuse, Behavioral Disorder, and Mental Health Counselors, and Registered Nurses* are the fastest growing Later occupations.

Ozark Region Fastest Growing Occupations



NOTE: OCCUPATIONS WITH NET INCREASE OF LESS THAN 50 ARE OMITTED

SOURCE: MERIC OCCUPATIONAL PROJECTIONS, 2018-2028

★ DENOTES OCCUPATIONS TOP TEN ONLINE JOB ADS FOR 2019-2020 IN THE REGION AND WITHIN THE NOW-NEXT-LATER CLASSIFICATIONS

OZARK REGION

Ozark Region Long-Term Occupational Projections by Top Openings

Occupation	2018 Estimated Employment	2028 Projected Employment	Growth Openings	Exits	Transfers	Total Openings	Median Wages
NOW							
Combined Food Preparation and Serving Workers	7,530	9,336	1,806	672	829	1,682	\$19,336 ★
Cashiers	7,481	7,753	272	680	757	1,464	\$20,199 ★
Retail Salespersons	8,752	9,183	431	515	794	1,352	\$23,245 ★
Personal Care Aides	4,770	7,396	2,626	450	398	1,111	\$21,669 ★
Waiters and Waitresses	4,958	5,522	564	364	642	1,062	\$18,964
NEXT							
Heavy and Tractor-Trailer Truck Drivers	7,231	7,465	234	302	533	858	\$40,130 ★
Secretaries & Administrative Assistants	6,178	6,024	-154	313	370	668	\$30,148 ★
Nursing Assistants	3,854	5,002	1,148	238	258	611	\$24,832
Cooks, Restaurant	3,127	3,979	852	189	314	588	\$21,848
Supervisors of Food Prep and Serving Workers	1,929	2,250	321	91	228	351	\$28,220 ★
LATER							
Registered Nurses	5,853	7,842	1,989	190	176	565	\$55,334 ★
General and Operations Managers	4,217	4,793	576	94	297	449	\$71,207 ★
Elementary School Teachers	2,652	2,933	281	87	119	234	\$46,561
Sub. Abuse, Behavioral, and Mental Health Counselors	1,360	1,847	487	52	112	213	\$25,983
Accountants & Auditors	1,618	1,831	213	49	112	182	\$54,833 ★

SOURCE: MERIC OCCUPATIONAL PROJECTIONS 2018-2028

★ DENOTES OCCUPATIONS IN THE TOP TEN FOR 2019-2020 ON-LINE JOB ADS IN THE REGION & WITHIN THE NOW-NEXT-LATER CLASSIFICATION

DEPARTMENT OF
HIGHER EDUCATION &
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This report was prepared by the staff of the Missouri Economic Research and Information Center (MERIC) as part of the Missouri Workforce Report. All data in this report was current at the time of publication and is subject to revision. Additional details on data sources can be found in the full report.

This workforce solution was funded by a grant awarded by the U.S. Department of Labor's Employment and Training Administration. The solution was created by the grantee and does not necessarily reflect the official position of the U.S. Department of Labor. The Department of Labor makes no guarantees, warranties, or assurances of any kind, express or implied, with respect to such information, including any information on linked sites and including, but not limited to, accuracy of the information or its completeness, timeliness, usefulness, adequacy, continued availability, or ownership.

2020 ECONOMIC REPORT

SOUTH CENTRAL REGION



The South Central Region is comprised of 12 counties in the center of the southern portion of Missouri. The region is home to several cities including West Plains and Poplar Bluff.

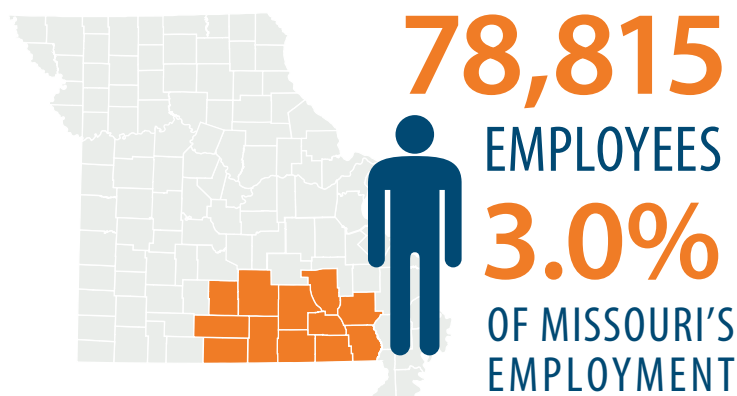
The South Central Region workforce has more than 78,800 employees, making up 3 percent of Missouri's employment. In 2019, 55 percent of the workforce was female and 45 percent was male.

The workforce is getting older in the South Central Region, a trend happening throughout Missouri and the U.S. In 2019, 25 percent of the workforce was age 55 or older, up from 19 percent a decade earlier.

For the region, 6 percent of the workforce was non-white, compared to 17 percent for the state; 2 percent of the region's workforce was Hispanic or Latino, compared to 4 percent for Missouri.

For 2 percent of the region's population (ages 18 to 64) the primary language spoken at home is something other than English. By comparison, Missouri was at 7 percent and the U.S. population at 23 percent.

The South Central Region has a higher percentage of the population with a disability compared to the state and the nation. For the South Central Region, 22 percent of the population has a disability compared to 13 percent in Missouri and 10 percent in the U.S.



Workforce Demographics

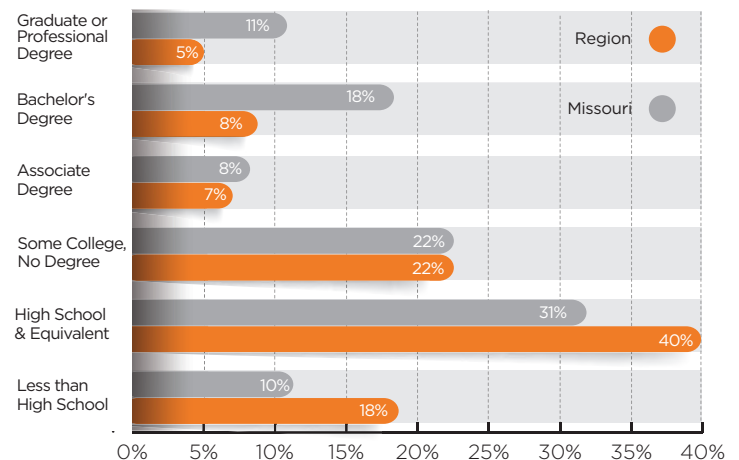
	SC Region	Missouri	Nationwide
Average monthly employment in 2019	78,815	2,981,688	150,939,000
Average Unemployment Rate in 2019	4.7%	3.3%	3.7%
Female	55%	51%	50%
Male	45%	49%	50%
Non-white	6%	17%	23%
Hispanic or Latino	2%	4%	16%
Ages 55 and older	25%	23%	23%
With disabilities (ages 18-64)	22%	13%	10%
Below Poverty Levels (ages 18-64)	22%	14%	13%
Language other than English (ages 18-64)	2%	7%	23%
Associate degree or higher: Edu Attain.	21%	37%	40%

SOURCES: CENSUS ACS 2018-5YR EST.; LEHD 2ND QUARTER; BLS QCEW NOT-SEASONALLY ADJUSTED

Educational attainment rates for the South Central Region are lower than those of the state in regards to bachelor's or advanced degrees. Twenty-one percent of the region's population, age 25 and older, has an associate, bachelor's or advanced degree compared to 37 percent for the state.

The regional unemployment rate was 4.7 percent in 2019 overall. In May 2019 the rate was at 4.4 percent and as of May 2020 the preliminary rate stood at 9.3 percent, an increase of 4.9 points. This increase was a direct result of business shutdowns and job losses due to the COVID-19 pandemic.

Educational Attainment



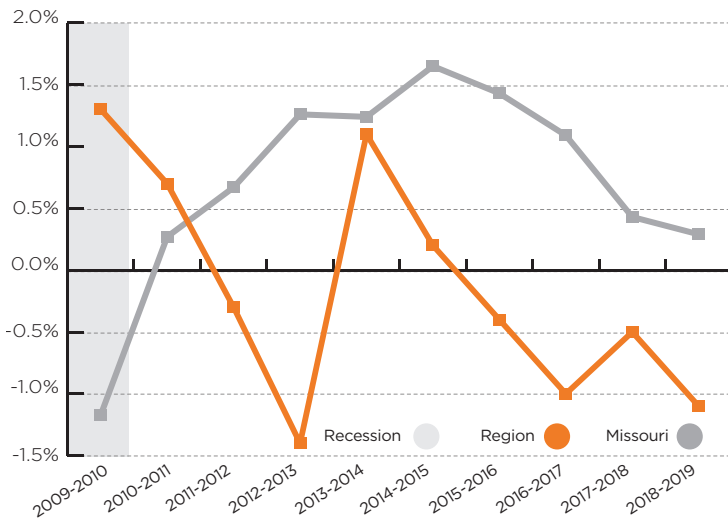
SOURCE: US CENSUS BUREAU, ACS 2018 5-YEAR ESTIMATES

SOUTH CENTRAL REGION

INDUSTRY ANALYSIS

The South Central Region averaged over 59,800 employees in June 2019. The region lost 642 jobs from June 2018 to June 2019, resulting in a decrease of 1.1 percent employment growth. Missouri employment increased by 0.3 percent in that time. From 2015 to 2019, the South Central Region averaged a negative 0.3 percent annual growth for an overall decrease of 1.5 percent; during that same period Missouri's employment grew 3.6 percent.

South Central Employment Annual Growth Rate



SOURCE: MERIC, QCEW

Health Care and Social Assistance continues to be one of the largest employing industries in the region with over 12,200 jobs and grew 0.3 percent since 2015. *Manufacturing* is the second largest industry in the area at over 8,200 jobs.

The *Retail Trade* industry maintains a steady workforce of over 7,200 jobs. *Accommodation and Food Services* gained 422 jobs showing annual growth of 1.8 percent. The *Wholesale Trade* industry gained 157 jobs since 2015, increasing at an annualized 1.8 percent.

South Central Region Top Employing Industries

Industry	Employment 2015	Employment 2019	Net Change	2015-2019 Empl. CAGR	2019 Annual Wages
Health Care & Social Assistance	12,064	12,237	173	0.3%	\$33,756
Manufacturing	8,681	8,230	(451)	-1.1%	\$35,124
Retail Trade	7,541	7,257	(284)	-0.8%	\$26,148
Educational Services	6,398	6,186	(212)	-0.7%	\$42,288
Accommodation & Food Services	4,569	4,991	422	1.8%	\$16,380
Public Administration	2,995	3,004	9	0.1%	\$33,132
Wholesale Trade	1,717	1,874	157	1.8%	\$49,344
Finance & Insurance	1,700	1,766	66	0.8%	\$41,628
Construction	1,702	1,668	(34)	-0.4%	\$39,528
Admin Support & Waste	2,822	1,627	(1,195)	-10.4%	\$28,008
Prof., Scientific, & Technical Services	1,518	1,548	30	0.4%	\$59,364
Transportation & Warehousing	1,477	1,405	(72)	-1.0%	\$39,396

SOURCE: LEHD-QWI, 2015-2019 2ND QUARTER

LOCATION QUOTIENT

To understand the major industries within a region, an analysis of industry concentration or clustering can be useful. The Location Quotient (LQ) describes the concentration of an industry in a geographic region, in relation to the nation, with 1.0 being the national average. Industries higher than 1.0 indicate a concentration.

The South Central Region has higher concentrations in *Wood Product Manufacturing*, *Gas Stations*, *Machinery Manufacturing*, *Forestry and Logging*, *Nursing and Residential Care Facilities*, and *Social Assistance*, just to name a few.

Large employers do not necessarily have a high LQ, though sometimes that is the case. The South Central Region's largest employers include health care providers Poplar Bluff Regional Medical Center, Ozark Medical Center, Texas County Memorial Hospital and John J. Pershing VA Medical Hospital.

Examples of manufacturers in the region include Scroll Compressors, Windsor Foods, Vitronic Promotional Group, Missouri Forge Inc., and Revere Plastics Systems LLC.

Public sector employers include South Central Correctional Center, Missouri State University-West Plains campus, and Three Rivers Community College.



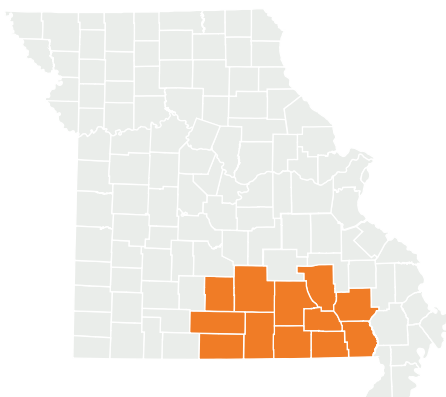
2019 South Central Region Location Quotients

Industry	Employment	Location Quotient
Wood Product Manufacturing	1,743	11.5
Gasoline Stations	1,193	3.4
Forestry & Logging	67	3.4
Machinery Manufacturing	925	2.2
Nursing & Residential Care Facilities	2,685	2.1
Social Assistance	2,807	1.9
Building Material & Garden Supply Stores	865	1.8
General Merchandise Stores	1,926	1.7
Truck Transportation	880	1.5
Motor Vehicle & Parts Dealers	1,159	1.5
Credit Intermediation & Related Activities	1,241	1.3
Food & Beverage Stores	1,390	1.2

SOURCE: MERIC, QCEW, 2019 ANNUAL AVERAGES

SOUTH CENTRAL REGION

Projected growth by industry helps to identify future employment needs for an area. Projections indicate that the largest growth industries in the South Central Region will be *Social Assistance*, *Ambulatory Health Care Services*, *Food Services and Drinking Places*, and *Administrative and Support Services*.



South Central Region Largest Growth Industries 2018-2028

Industry	Employment		Change	
	2018 Estimated	2028 Projected	2018-2028 Numeric	2018-2028 Percent
Social Assistance	3,737	4,703	966	25.9%
Ambulatory Health Care Services	3,019	3,896	877	29.0%
Food Services & Drinking Places	4,458	5,180	722	16.2%
Administrative & Support Services	1,626	2,113	487	30.0%
Professional, Scientific, & Technical Services	1,310	1,466	156	11.9%
Merchant Wholesalers, Durable Goods	854	978	124	14.5%
Management of Companies & Enterprises	551	668	117	21.2%
Building Material & Garden Equip. & Supplies	941	1,049	108	11.4%
Transit & Ground Passenger Transportation	203	299	96	47.5%
Gasoline Stations	1,165	1,247	82	7.1%

SOURCES: MERIC INDUSTRY PROJECTIONS

PROJECTED GROWTH BY INDUSTRY HELPS TO IDENTIFY FUTURE EMPLOYMENT NEEDS FOR AN AREA.

OCCUPATIONAL PROJECTIONS

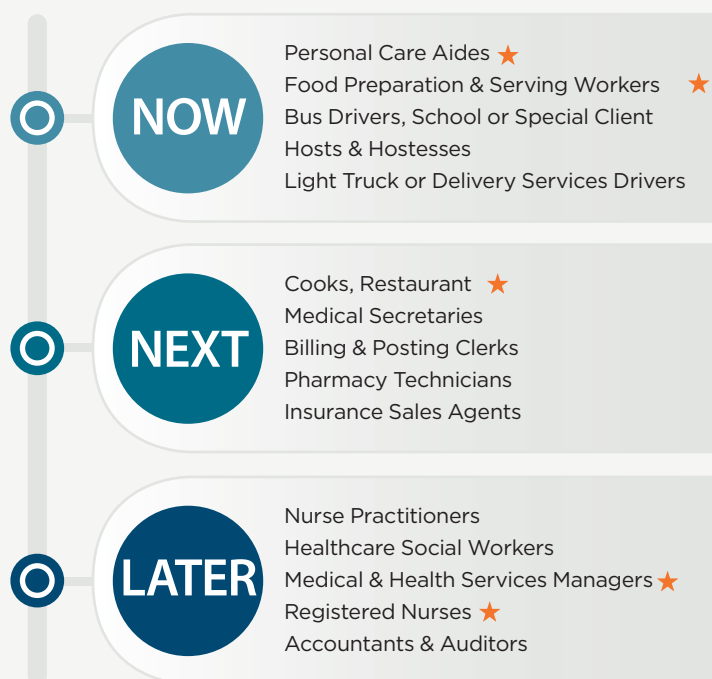
MERIC produces occupational projections that estimate labor demand over a 10-year period. MERIC categorizes these occupations using its Now-Next-Later method to help job seekers understand the training, education, and experience requirements for various occupations.

Now jobs typically require short-term on-the-job training, little to no experience, and/or a high school diploma. Now occupations include *Cashiers*, *Personal Care Aides*, and *Combined Food Preparation and Serving Workers* which lead the way in total openings. *Personal Care Aides*, *Combined Food Preparation and Serving Workers*, and *Bus Drivers* are projected to be the fastest growing Now occupations over the next decade.

Next jobs typically require a non-degree certificate, associate degree, apprenticeship, some experience, or moderate- to long-term training. *Secretaries and Administrative Assistants*, *Nursing Assistants*, and *Cooks* will have the most openings for the Next category of occupations. *Cooks*, *Medical Secretaries*, and *Billing and Posting Clerks* are the fastest growing Next occupations.

Later jobs typically require a bachelor's degree or higher. For Later occupations, *Registered Nurses*, *General and Operations Managers*, and *Elementary School Teachers* will have the most openings. *Nurse Practitioners*, *Healthcare Social Workers*, and *Medical and Health Service Managers* are the fastest growing Later occupations.

South Central Region Fastest Growing Occupations



NOTE: OCCUPATIONS WITH NET INCREASE OF LESS THAN 50 ARE OMITTED

SOURCE: MERIC OCCUPATIONAL PROJECTIONS, 2018-2028

★ DENOTES OCCUPATIONS TOP TEN ONLINE JOB ADS FOR 2019-2020 IN THE REGION AND WITHIN THE NOW-NEXT-LATER CLASSIFICATIONS

SOUTH CENTRAL REGION

South Central Region Long-Term Occupational Projections by Top Openings

Occupation	2018 Estimated Employment	2028 Projected Employment	Growth Openings	Exits	Transfers	Total Openings	Median Wages
NOW							
Cashiers	2,805	2,780	-25	249	278	525	\$19,214 ★
Personal Care Aides	2,640	3,449	809	225	199	505	\$21,300 ★
Combined Food Preparation and Serving Workers	1,694	2,043	349	149	184	368	\$18,726 ★
Waiters and Waitresses	960	1,038	78	69	122	199	\$18,482
Retail Salespersons	1,358	1,361	3	78	120	198	\$23,515 ★
NEXT							
Secretaries and Administrative Assistants	1,754	1,566	-188	85	101	167	\$27,673
Nursing Assistants	1,078	1,145	67	60	65	132	\$22,031 ★
Cooks, Restaurant	725	898	173	43	72	132	\$19,898 ★
Heavy and Tractor-Trailer Truck Drivers	975	990	15	40	71	113	\$35,802 ★
Assemblers and Fabricators, All Other	841	807	-34	34	62	93	\$25,678
LATER							
Registered Nurses	1,573	1,781	208	46	43	110	\$56,217 ★
General and Operations Managers	865	913	48	19	59	83	\$60,171 ★
Elementary School Teachers	1,056	1,028	-28	32	44	73	\$37,858
Substitute Teachers	530	517	-13	30	29	58	\$22,590
Child, Family, and School Social Workers	528	544	16	16	36	54	\$34,523

SOURCE: MERIC OCCUPATIONAL PROJECTIONS 2018-2028

★ DENOTES OCCUPATIONS IN THE TOP TEN FOR 2019-2020 ON-LINE JOB ADS IN THE REGION & WITHIN THE NOW-NEXT-LATER CLASSIFICATION

DEPARTMENT OF
HIGHER EDUCATION &
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This workforce solution was funded by a grant awarded by the U.S. Department of Labor's Employment and Training Administration. The solution was created by the grantee and does not necessarily reflect the official position of the U.S. Department of Labor. The Department of Labor makes no guarantees, warranties, or assurances of any kind, express or implied, with respect to such information, including any information on linked sites and including, but not limited to, accuracy of the information or its completeness, timeliness, usefulness, adequacy, continued availability, or ownership.

2020 ECONOMIC REPORT SOUTHEAST REGION



DEPARTMENT OF
HIGHER EDUCATION &
WORKFORCE DEVELOPMENT

The Southeast Region is comprised of 13 counties in the southeast portion of Missouri. The region is home to several cities including Cape Girardeau, Sikeston, Caruthersville, and Park Hills.

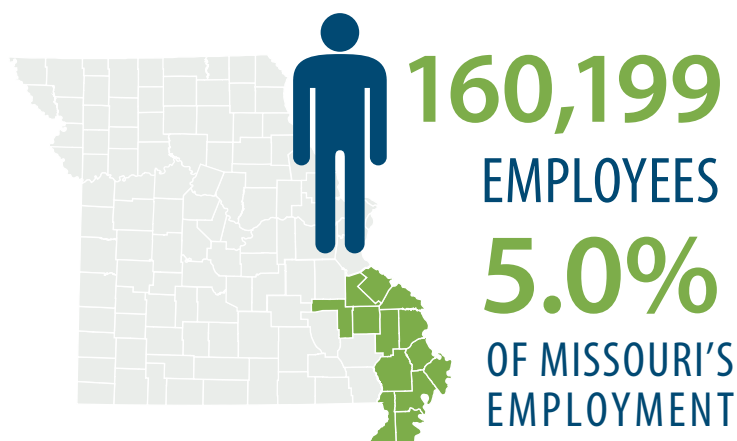
The Southeast Region workforce has more than 160,100 employees, making up 5 percent of Missouri's employment. In 2019, 53 percent of the workforce was female and 47 percent was male, compared to Missouri's overall 51 percent female and 49 percent male.

The workforce is getting older in the Southeast Region, a trend happening throughout Missouri and the U.S. In 2019, 24 percent of the workforce was age 55 or older, up from 20 percent a decade earlier.

For the region, 10 percent of the workforce was non-white, compared to 17 percent for the state; 2 percent of the region's workforce was Hispanic or Latino, compared to 4 percent for Missouri.

For 3 percent of the region's population (ages 18 to 64) the primary language spoken at home is something other than English. By comparison, Missouri was at 7 percent and the U.S. population at 23 percent.

The Southeast Region has a higher percentage of the population with a disability compared to the state and the nation. For the Southeast Region, 18 percent of the population has a disability compared to 13 percent in Missouri and 10 percent in the U.S.



Workforce Demographics

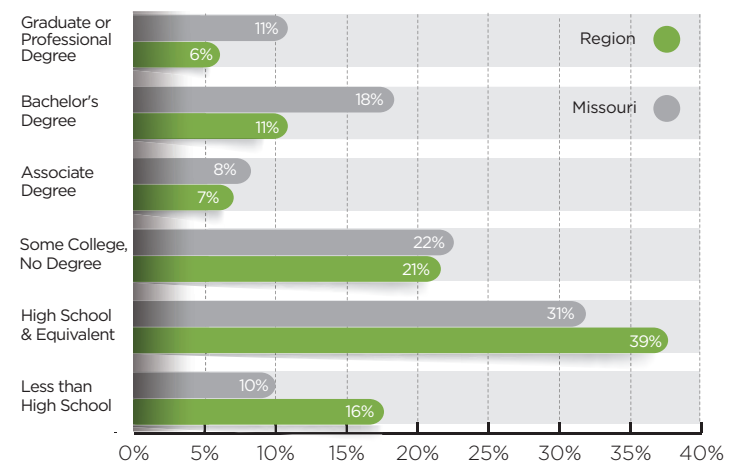
	SE Region	Missouri	Nationwide
Average monthly employment in 2019	160,199	2,981,688	150,939,000
Average Unemployment Rate in 2019	3.7%	3.3%	3.7%
Female	53%	51%	50%
Male	47%	49%	50%
Non-white	10%	17%	23%
Hispanic or Latino	2%	4%	16%
Ages 55 and older	24%	23%	23%
With disabilities (ages 18-64)	18%	13%	10%
Below Poverty Levels (ages 18-64)	19%	14%	13%
Language other than English (ages 18-64)	3%	7%	23%
Associate degree or higher: Edu Attain.	24%	37%	40%

SOURCES: CENSUS ACS 2018-5YR EST.; LEHD 2ND QUARTER; BLS QCEW NOT-SEASONALLY ADJUSTED

Educational attainment rates for the Southeast Region are lower than those of the state in regards to bachelor's or advanced degrees. Twenty-four percent of the region's population, age 25 and older, has an associate, bachelor's or advanced degree compared to 37 percent for the state.

The regional unemployment rate was 3.7 percent in 2019 overall. In May 2019 the rate was at 3.3 percent and as of May 2020 the preliminary rate stood at 9.0 percent, an increase of 5.7 points. This increase was a direct result of business shutdowns and job losses due to the COVID-19 pandemic.

Educational Attainment



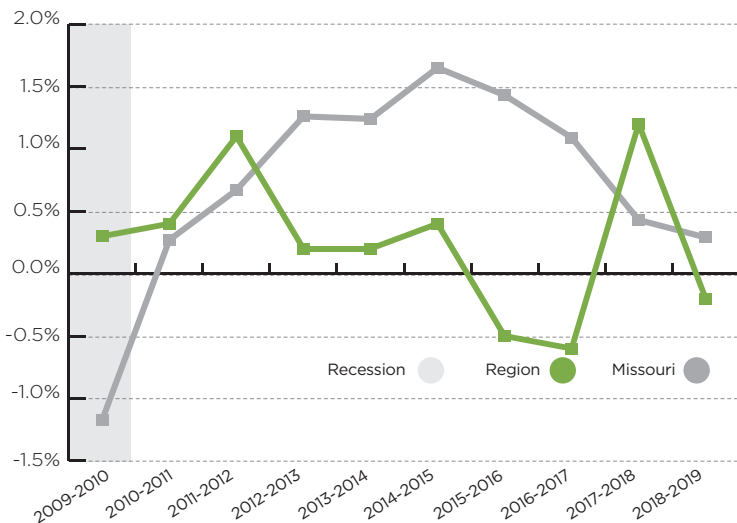
SOURCE: US CENSUS BUREAU, ACS 2018 5-YEAR ESTIMATES

SOUTHEAST REGION

INDUSTRY ANALYSIS

The Southeast Region averaged over 141,500 employees in June 2019. The region lost 235 jobs from June 2018 to June 2019, resulting in a negative 0.2 percent employment growth. Missouri employment increased by 0.3 percent in that time. From 2015 to 2019, the Southeast Region averaged a decrease of 0.1 percent annual growth for an overall decrease of 0.3 percent; during that same period Missouri's employment grew 3.6 percent.

Southeast Employment Annual Growth Rate



SOURCE: MERC, QCEW

Health Care and Social Assistance continues to be one of the largest employing industries in the region, and from 2015 to 2019 there were 967 jobs added. *Manufacturing* is the second largest industry, though it lost over 300 jobs in the five-year period, it maintains a workforce of over 18,600.

Retail Trade lost 643 jobs at an annualized rate of -0.8 percent. *Educational Services* lost 90 jobs since 2015. *Accommodation and Food Services* grew by 481 jobs from 2015 to 2019.

Southeast Region Top Employing Industries

Industry	Employment 2015	Employment 2019	Net Change	2015-2019 Empl. CAGR	2019 Annual Wages
Health Care & Social Assistance	30,868	31,835	967	0.6%	\$39,060
Manufacturing	19,007	18,649	(358)	-0.4%	\$49,488
Retail Trade	16,578	15,935	(643)	-0.8%	\$27,744
Educational Services	12,443	12,353	(90)	-0.1%	\$47,292
Accommodation & Food Services	10,601	11,082	481	0.9%	\$17,784
Construction	6,299	6,711	412	1.3%	\$50,400
Public Administration	6,645	6,642	(3)	0.0%	\$33,924
Wholesale Trade	6,233	5,806	(427)	-1.4%	\$51,444
Transportation & Warehousing	5,519	4,944	(575)	-2.2%	\$45,324
Admin Support & Waste	4,813	4,734	(79)	-0.3%	\$37,308
Finance & Insurance	3,726	3,994	268	1.4%	\$50,160
Prof., Scientific, & Tech. Services	2,638	3,359	721	5.0%	\$51,360

SOURCE: LEHD-QWI, 2015-2019 2ND QUARTER

LOCATION QUOTIENT

To understand the major industries within a region, an analysis of industry concentration or clustering can be useful. The Location Quotient (LQ) describes the concentration of an industry in a geographic region, in relation to the nation, with 1.0 being the national average. Industries higher than 1.0 indicate a concentration.

The Southeast Region has higher concentrations in *Mining, Gas Stations, Crop Production, Wood Product Manufacturing, Truck Transportation, and Social Assistance* just to name a few.

Large employers do not necessarily have a high LQ, though sometimes that is the case. The Southeast Region's largest employers include health care providers St. Francis Medical Center, Southeast Missouri Hospital, Southeast Missouri Mental Health Center, Visiting Nurse Association, and Missouri Delta Medical Center.

Examples of *Manufacturers* in the region include TG Missouri Corporation, Gilster-Mary Lee, Trinity Marine Products Inc., Forte Product Solutions, LafargeHolcim, WW Wood Products Inc., and Proctor & Gamble.

Southeast Missouri State University is a large public sector employer in the region.



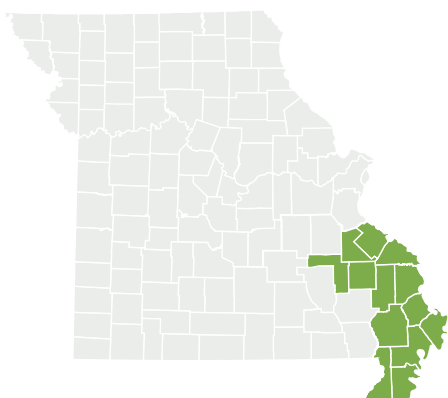
2019 Southeast Region Location Quotients

Industry	Employment	Location Quotient
Mining, except Oil & Gas	1,012	5.8
Crop Production	1,435	2.9
Wood Product Manufacturing	963	2.6
Gasoline Stations	2,147	2.5
Social Assistance	7,515	2.1
Truck Transportation	2,642	1.9
Agriculture & Forestry Support Activities	529	1.5
Health & Personal Care Stores	1,121	1.2
Electrical Equipment & Appliance Mfg.	423	1.2
General Merchandise Stores	3,115	1.1
Telecommunications	732	1.1
Motor Vehicle & Parts Dealers	2,052	1.1

SOURCE: MERC, QCEW, 2019 ANNUAL AVERAGES

SOUTHEAST REGION

Projected growth by industry helps to identify future employment needs for an area. Projections indicate that the largest growth industries in the Southeast Region will be *Social Assistance, Ambulatory Health Care Services, Food Services and Drinking Places, Hospitals, and Merchant Wholesalers (Durable Goods)*.



Southeast Region Largest Growth Industries 2018-2028

Industry	Employment		Change	
	2018 Estimated	2028 Projected	2018-2028 Numeric	2018-2028 Percent
Social Assistance	9,513	11,720	2,207	23.2%
Ambulatory Health Care Services	6,989	8,672	1,683	24.1%
Food Services & Drinking Places	10,434	11,335	901	8.6%
Hospitals	8,504	9,041	537	6.3%
Merchant Wholesalers, Durable Goods	3,006	3,379	373	12.4%
Professional, Scientific, & Technical Services	3,028	3,287	259	8.6%
Truck Transportation	2,798	3,040	242	8.6%
Primary Metal Manufacturing	952	1,179	227	23.8%
Insurance Carriers & Related Activities	1,618	1,819	201	12.4%
Construction of Buildings	1,585	1,754	169	10.7%

SOURCES: MERIC INDUSTRY PROJECTIONS

PROJECTED GROWTH BY INDUSTRY HELPS TO IDENTIFY FUTURE EMPLOYMENT NEEDS FOR AN AREA.

OCCUPATIONAL PROJECTIONS

MERIC produces occupational projections that estimate labor demand over a 10-year period. MERIC categorizes these occupations using its Now-Next-Later method to help job seekers understand the training, education, and experience requirements for various occupations.

Now jobs typically require short-term on-the-job training, little to no experience, and/or a high school diploma. Now occupations include *Personal Care Aides, Combined Food Preparation and Serving Workers*, and *Cashiers* which lead the way in total openings. *Personal Care Aides, Home Health Aides*, and *Taxi Drivers and Chauffeurs* are projected to be the fastest growing Now occupations over the next decade.

Next jobs typically require a non-degree certificate, associate degree, apprenticeship, some experience, or moderate- to long-term training. *Heavy and Tractor-Trailer Truck Drivers, Secretaries and Administrative Assistants*, and *Nursing Assistants* will have the most openings for the Next category of occupations. *Insurance Sales Agents, Medical Assistants*, and *Cooks* are the fastest growing Next occupations.

Later jobs typically require a bachelor's degree or higher. For Later occupations *Registered Nurses, General and Operations Managers*, and *Accountants and Auditors* will have the most openings. *Market Research Analysts and Substance Abuse, Behavioral Disorder, and Mental Health Counselors* are the fastest growing Later occupations.

Southeast Region Fastest Growing Occupations



NOTE: OCCUPATIONS WITH NET INCREASE OF LESS THAN 50 ARE OMITTED

SOURCE: MERIC OCCUPATIONAL PROJECTIONS, 2018-2028

★ DENOTES OCCUPATIONS TOP TEN ONLINE JOB ADS FOR 2019-2020 IN THE REGION AND WITHIN THE NOW-NEXT-LATER CLASSIFICATIONS

SOUTHEAST REGION

Southeast Region Long-Term Occupational Projections by Top Openings

Occupation	2018 Estimated Employment	2028 Projected Employment	Growth Openings	Exits	Transfers	Total Openings	Median Wages
NOW							
Personal Care Aides	7,239	9,649	2,410	624	553	1,418	\$21,311 ★
Combined Food Preparation and Serving Workers	4,926	5,546	620	418	515	995	\$18,827 ★
Cashiers	4,580	4,445	-135	403	448	837	\$19,195 ★
Retail Salespersons	4,435	4,243	-192	249	384	614	\$21,937 ★
Farmworkers and Laborers	2,571	2,546	-25	102	316	416	\$34,386
NEXT							
Heavy and Tractor-Trailer Truck Drivers	3,739	3,963	224	158	279	459	\$40,188 ★
Secretaries and Administrative Assistants	4,306	3,859	-447	209	248	412	\$28,829
Nursing Assistants	2,691	2,840	149	149	161	325	\$22,432 ★
Cooks, Restaurant	1,264	1,481	217	73	121	216	\$21,218 ★
Supervisors of Food Prep and Serving Workers	1,149	1,226	77	52	130	190	\$25,852
LATER							
Registered Nurses	3,568	3,958	390	104	96	239	\$56,132 ★
General and Operations Managers	2,207	2,272	65	47	148	201	\$65,177 ★
Accountants and Auditors	1,074	1,150	76	31	72	111	\$48,307
Secondary School Teachers	1,643	1,586	-57	45	68	107	\$42,712
Elementary School Teachers	1,319	1,269	-50	40	55	90	\$44,247

SOURCE: MERIC OCCUPATIONAL PROJECTIONS 2018-2028

★ DENOTES OCCUPATIONS IN THE TOP TEN FOR 2019-2020 ON-LINE JOB ADS IN THE REGION & WITHIN THE NOW-NEXT-LATER CLASSIFICATION

DEPARTMENT OF
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This report was prepared by the staff of the Missouri Economic Research and Information Center (MERIC) as part of the Missouri Workforce Report. All data in this report was current at the time of publication and is subject to revision. Additional details on data sources can be found in the full report.

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2020 ECONOMIC REPORT SOUTHWEST REGION

DEPARTMENT OF
HIGHER EDUCATION &
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The Southwest Region is comprised of 7 counties in the southwest corner of Missouri. This region is home to several cities including Joplin, Neosho, and Monett.

The Southwest Region workforce has more than 133,300 employees, making up 4 percent of Missouri's employment. In 2019, 48 percent of the workforce was female and 52 percent was male.

The workforce is getting older in the Southwest Region, a trend happening throughout Missouri and the U.S. In 2019, 24 percent of the workforce was age 55 or older, up from 19 percent a decade earlier.

For the region, 9 percent of the workforce was non-white, compared to 17 percent for the state; 8 percent of the region's workforce was Hispanic or Latino, compared to 4 percent for Missouri.

For 8 percent of the region's population (ages 18 to 64) the primary language spoken at home is something other than English. By comparison, Missouri was at 7 percent and the U.S. population at 23 percent.

The Southwest Region has a slightly higher percentage of the population with a disability compared to the state and the nation. For the Southwest Region, 14 percent of the population has a disability compared to 13 percent in Missouri and 10 percent in the U.S.

Workforce Demographics

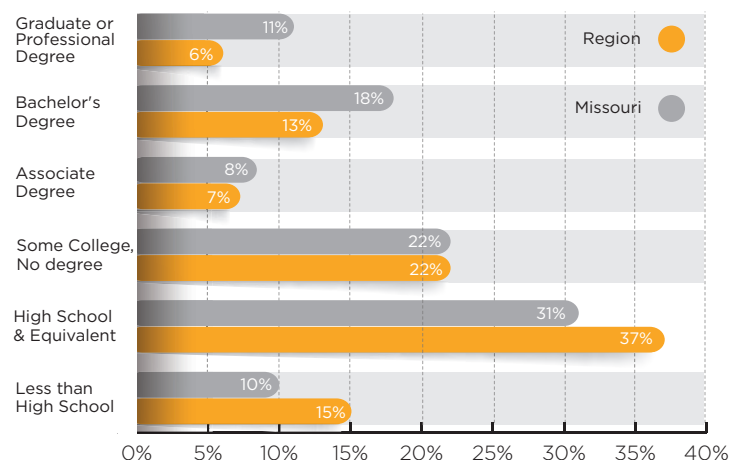
	SW Region	Missouri	Nationwide
Average monthly employment in 2019	133,312	2,981,688	150,939,000
Average Unemployment Rate in 2019	3.2%	3.3%	3.7%
Female	48%	51%	50%
Male	52%	49%	50%
Non-white	9%	17%	23%
Hispanic or Latino	8%	4%	16%
Ages 55 and older	24%	23%	23%
With disabilities (ages 18-64)	14%	13%	10%
Below Poverty Levels (ages 18-64)	16%	14%	13%
Language other than English (ages 18-64)	8%	7%	23%
Associate degree or higher: Edu Attain.	26%	37%	40%

SOURCES: CENSUS ACS 2018-5YR EST.; LEHD 2ND QUARTER; BLS QCEW NOT-SEASONALLY ADJUSTED

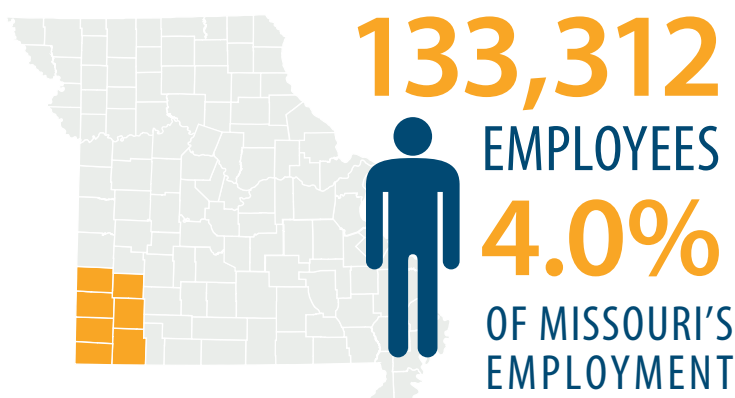
Educational attainment rates for the Southwest Region are lower than those of the state in regards to bachelor's or advanced degrees. Twenty-six percent of the region's population, age 25 and older, has an associate, bachelor's or advanced degree compared to 37 percent for the state.

The regional unemployment rate was 3.2 percent in 2019 overall. In May 2019 the rate was at 2.9 percent and as of May 2020 the preliminary rate stood at 8.6 percent, an increase of 5.7 points. This increase was a direct result of business shutdowns and job losses due to the COVID-19 pandemic.

Educational Attainment



SOURCE: US CENSUS BUREAU, ACS 2018 5-YEAR ESTIMATES

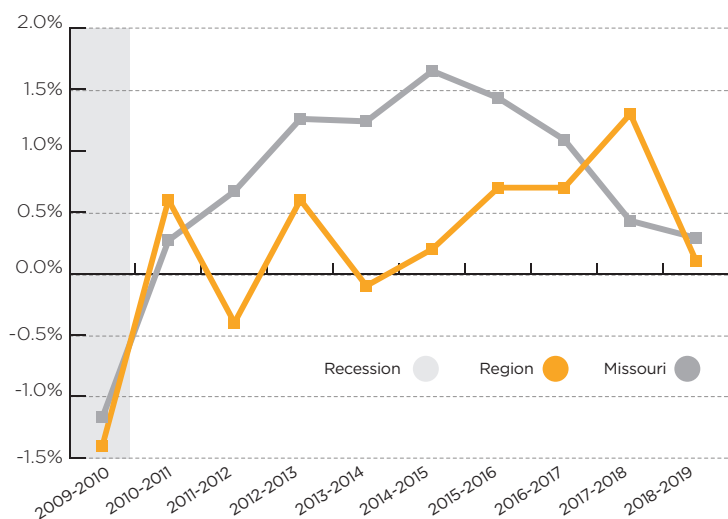


SOUTHWEST REGION

INDUSTRY ANALYSIS

The Southwest Region averaged over 114,600 employees in June 2019. The region gained 111 jobs from June 2018 to June 2019, resulting in a 0.1 percent employment growth. Missouri employment increased by 0.3 percent in that time. From 2015 to 2019, the Southwest Region averaged 0.5 percent annual growth for an overall increase of 2.4 percent; during that same period Missouri's employment grew 3.6 percent.

Southwest Employment Annual Growth Rate



SOURCE: MERIC, QCEW

Manufacturing is the largest employing industry in the region at over 24,100 jobs and growing 0.4 percent annually. **Health Care and Social Assistance** is the second largest industry in the area at over 16,300 jobs. **Retail Trade** added 136 new jobs since 2015 and is growing at an annualized 0.2 percent.

Educational Services maintained its employment at just over 10,700 from 2015 and 2019. **Accommodation and Food Services** added 478 jobs in the region. **Transportation and Warehousing** grew by 958 jobs and **Wholesale Trade** grew by 584 jobs since 2015.

Southwest Region Top Employing Industries

Industry	Employment 2015	Employment 2019	Net Change	2015-2019 Empl. CAGR	2019 Annual Wages
Manufacturing	23,691	24,135	444	0.4%	\$48,708
Health Care & Social Assistance	15,520	16,373	853	1.1%	\$46,824
Retail Trade	13,048	13,184	136	0.2%	\$28,728
Educational Services	10,701	10,713	12	0.0%	\$49,320
Accommodation & Food Services	8,603	9,081	478	1.1%	\$16,920
Transportation & Warehousing	6,341	7,299	958	2.9%	\$45,504
Admin Support & Waste	4,976	4,835	(141)	-0.6%	\$31,344
Wholesale Trade	4,106	4,690	584	2.7%	\$50,208
Construction	4,249	4,493	244	1.1%	\$43,872
Prof., Scientific, & Technical Services	3,400	3,629	229	1.3%	\$66,240
Other Services (except Public Admin.)	2,738	2,791	53	0.4%	\$31,512
Public Administration	2,563	2,542	(21)	-0.2%	\$31,032

SOURCE: LEHD-QWI, 2015-2019 2ND QUARTER

LOCATION QUOTIENT

To understand the major industries within a region, an analysis of industry concentration or clustering can be useful. The Location Quotient (LQ) describes the concentration of an industry in a geographic region, in relation to the nation, with 1.0 being the national average. Industries higher than 1.0 indicate a concentration.

The Southwest Region has higher concentrations in *Food Manufacturing*, *Truck Transportation*, *Animal Production*, *Fabricated Metal Manufacturing*, and *Electronic Equipment and Appliance Manufacturing* just to name a few.

Large employers do not necessarily have a high LQ, though sometimes that is the case. The Southwest Region's largest employers include health care providers Freeman Health System, Mercy Hospital, and Oxford Healthcare.

There are several manufacturers in the region. *Food Manufacturing* includes Butterball LLC, Schreiber Foods, and International Dehydrated Foods. Other manufacturers include EFCO Corp, Eagle Picher Technologies LLC, La-Z-Boy, and Jasper Products LLC.

Missouri Southern State University is a public sector employer in the region.



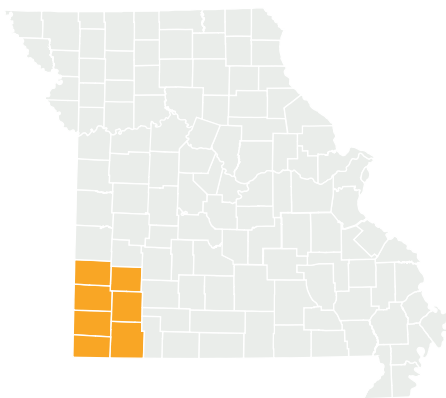
2019 Southwest Region Location Quotients

Industry	Employment	Location Quotient
Food Manufacturing	9,790	7.6
Truck Transportation	5,414	4.5
Animal Production & Aquaculture	713	3.4
Fabricated Metal Product Manufacturing	3,369	2.9
Electrical Equipment & Appliance Mfg.	844	2.7
Gasoline Stations	1,864	2.5
General Merchandise Stores	4,697	2.0
Nonmetallic Mineral Product Manufacturing	457	1.4
Utilities	599	1.4
Wood Product Manufacturing	438	1.4
Building Material & Garden Supply Stores	1,370	1.3
Motor Vehicle & Parts Dealers	2,098	1.3
Furniture & Related Product Manufacturing	390	1.3
Warehousing & Storage	1,109	1.1

SOURCE: MERIC, QCEW, 2019 ANNUAL AVERAGES

SOUTHWEST REGION

Projected growth by industry helps to identify future employment needs for an area. Projections indicate that the largest growth industries in the Southwest Region will be *Food Services and Drinking Places*, *Ambulatory Health Care Services*, *Merchant Wholesalers (Durable Goods)*, *Hospitals*, and *General Merchandise Stores*.



Southwest Region Largest Growth Industries 2018-2028

Industry	Employment		Change	
	2018 Estimated	2028 Projected	2018-2028 Numeric	Percent
Food Services & Drinking Places	8,501	9,576	1,075	12.6%
Ambulatory Health Care Services	4,117	4,963	846	20.5%
Merchant Wholesalers, Durable Goods	2,274	2,832	558	24.5%
Hospitals	6,262	6,658	396	6.3%
General Merchandise Stores	4,613	4,992	379	8.2%
Couriers and Messengers	352	551	199	56.5%
Warehousing and Storage	1,233	1,384	151	12.3%
Specialty Trade Contractors	2,536	2,678	142	5.6%
Administrative & Support Services	4,739	4,869	130	2.7%
Local Government, Excl. Education & Hospitals	3,958	4,069	111	2.8%

SOURCES: MERIC INDUSTRY PROJECTIONS

PROJECTED GROWTH BY INDUSTRY HELPS TO IDENTIFY FUTURE EMPLOYMENT NEEDS FOR AN AREA.

OCCUPATIONAL PROJECTIONS

MERIC produces occupational projections that estimate labor demand over a 10-year period. MERIC categorizes these occupations using its Now-Next-Later method to help job seekers understand the training, education, and experience requirements for various occupations.

Now jobs typically require short-term on-the-job training, little to no experience, and/or a high school diploma. Now occupations include *Combined Food Preparation and Serving Workers*, *Cashiers*, and *Retail Salespersons* which lead the way in total openings. *Personal Care Aides*, *Home Health Aides*, and *Combined Food Preparation and Serving Workers* are projected to be the fastest growing Now occupations over the next decade.

Next jobs typically require a non-degree certificate, associate degree, apprenticeship, some experience, or moderate- to long-term training. *Heavy and Tractor-Trailer Truck Drivers*, *Secretaries and Administrative Assistants*, and *Nursing Assistants* will have the most openings for the Next category of occupations. *Cooks*, *Medical Assistants*, and *Computer User Support Specialists* are the fastest growing Next occupations.

Later jobs typically require a bachelor's degree or higher. For Later occupations *Registered Nurses*, *General and Operations Managers*, and *Accountants and Auditors* will have the most openings. *Nurse Practitioners*, *Market Research Analysts*, and *Educational, Guidance, School, and Vocational Counselors* are the fastest growing Later occupations.

Southwest Region Fastest Growing Occupations



NOTE: OCCUPATIONS WITH NET INCREASE OF LESS THAN 50 ARE OMITTED

SOURCE: MERIC OCCUPATIONAL PROJECTIONS, 2018-2028

★ DENOTES OCCUPATIONS TOP TEN ONLINE JOB ADS FOR 2019-2020 IN THE REGION AND WITHIN THE NOW-NEXT-LATER CLASSIFICATIONS

SOUTHWEST REGION

Southwest Region Long-Term Occupational Projections by Top Openings

Occupation	2018 Estimated Employment	2028 Projected Employment	Growth Openings	Exits	Transfers	Total Openings	Median Wages
NOW							
Combined Food Preparation and Serving Workers	3,323	3,919	596	289	356	705	\$19,271 ★
Cashiers	3,474	3,418	-56	308	342	644	\$19,632 ★
Retail Salespersons	3,757	3,848	91	218	337	564	\$22,222 ★
Personal Care Aides	2,440	3,433	993	217	192	508	\$20,961 ★
Laborers and Freight, Stock, and Material Movers	2,505	2,503	-2	113	235	348	\$25,839 ★
NEXT							
Heavy and Tractor-Trailer Truck Drivers	5,592	5,696	104	232	409	651	\$42,012 ★
Secretaries and Administrative Assistants	2,818	2,532	-286	137	162	270	\$27,077
Nursing Assistants	1,833	1,969	136	102	111	227	\$23,292 ★
Food Batchmakers	1,756	1,399	-357	95	139	198	\$34,847
First-Line Supervisors of Retail Sales Workers	1,486	1,467	-19	51	111	160	\$36,687 ★
LATER							
Registered Nurses	2,725	2,977	252	79	73	177	\$54,029 ★
General and Operations Managers	1,744	1,812	68	37	117	161	\$61,772 ★
Accountants and Auditors	650	683	33	19	43	65	\$57,589 ★
Substitute Teachers	341	362	21	20	20	42	\$21,019
Child, Family, and School Social Workers	354	371	17	11	25	38	\$36,625

SOURCE: MERIC OCCUPATIONAL PROJECTIONS 2018-2028

★ DENOTES OCCUPATIONS IN THE TOP TEN FOR 2019-2020 ON-LINE JOB ADS IN THE REGION & WITHIN THE NOW-NEXT-LATER CLASSIFICATION

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2020 ECONOMIC REPORT ST. LOUIS REGION



DEPARTMENT OF
HIGHER EDUCATION &
WORKFORCE DEVELOPMENT

The St. Louis Region is comprised of 5 counties and is located in the east central part of Missouri. The region is home to several cities including Arnold, Washington, St. Charles, St. Peters, Florissant, O'Fallon, Chesterfield, and the City of St. Louis.

The St. Louis Region workforce has more than 1,051,100 employees, making up 35 percent of Missouri's employment. In 2019, 51 percent of the workforce was female and 49 percent was male, which matches the Missouri average.

The workforce is getting older in the St. Louis Region, a trend happening throughout Missouri and the U.S. In 2019, 24 percent of the workforce was age 55 or older, up from 18 percent a decade earlier.

For the region, 23 percent of the workforce was non-white, compared to 17 percent for the state; 3 percent of the region's workforce was Hispanic or Latino, compared to 4 percent for Missouri.

For 8 percent of the region's population (ages 18 to 64) the primary language spoken at home is something other than English. By comparison, Missouri was at 7 percent and the U.S. population at 23 percent.

The St. Louis Region has a lower percentage of the population with a disability compared to the state, but evenly matched to the nation. For the St. Louis Region, 10 percent of the population has a disability compared to 13 percent in Missouri and 10 percent in the U.S.

Workforce Demographics

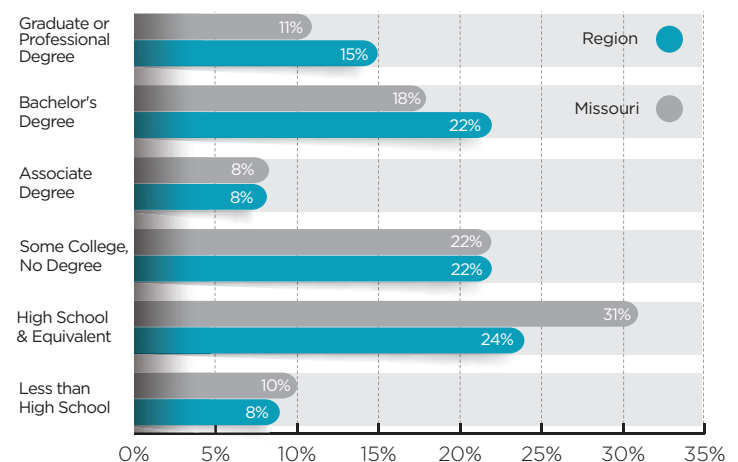
	St. Louis MO	Missouri	Nationwide
Average monthly employment in 2019	1,051,147	2,981,688	150,939,000
Average Unemployment Rate in 2019	3.1%	3.3%	3.7%
Female	51%	51%	50%
Male	49%	49%	50%
Non-white	23%	17%	23%
Hispanic or Latino	3%	4%	16%
Ages 55 and older	24%	23%	23%
With disabilities (ages 18-64)	10%	13%	10%
Below Poverty Levels (ages 18-64)	11%	14%	13%
Language other than English (ages 18-64)	8%	7%	23%
Associate degree or higher: Edu Attain.	46%	37%	40%

SOURCES: CENSUS ACS 2018-5YR EST.; LEHD 2ND QUARTER; BLS QCEW NOT-SEASONALLY ADJUSTED

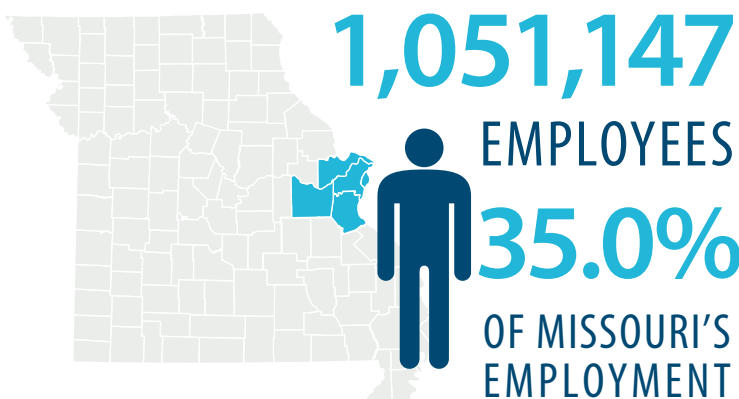
Educational attainment rates for the St. Louis Region are greater than those of the state in regards to bachelor's or advanced degrees. Forty-six percent of the region's population, age 25 and older, has an associate, bachelor's or advanced degree compared to 37 percent for the state.

The regional unemployment rate was 3.1 percent in 2019 overall. In May 2019 the rate was at 2.8 percent and as of May 2020 the preliminary rate stood at 10.6 percent, an increase of 7.8 points. This increase was a direct result of business shutdowns and job losses due to the COVID-19 pandemic.

Educational Attainment



SOURCE: US CENSUS BUREAU, ACS 2018 5-YEAR ESTIMATES

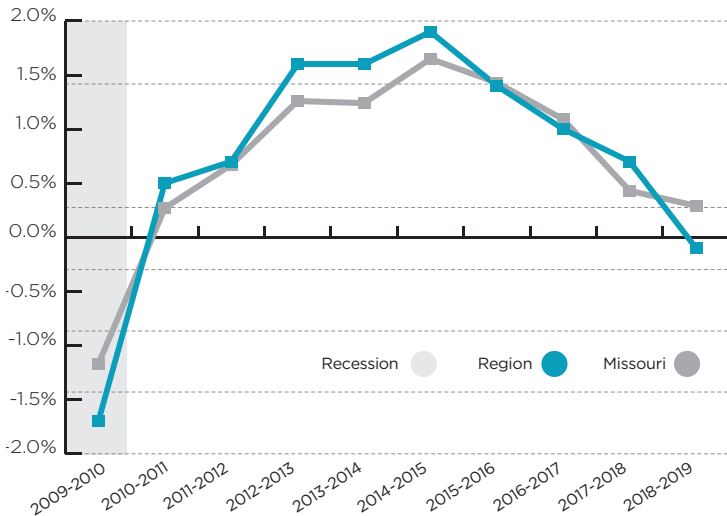


ST. LOUIS REGION

INDUSTRY ANALYSIS

The St. Louis Region averaged over 1,082,300 employees in June 2019. The region lost 823 jobs from June 2018 to June 2019, at a 0.1 percent decline. Missouri employment increased by 0.3 percent in that time. From 2015 to 2019, the St. Louis Region averaged 0.7 percent annual growth for an overall increase of 3.7 percent; during that same period Missouri's employment grew 3.6 percent.

St. Louis Employment Annual Growth Rate



SOURCE: MERIC, QCEW

Health Care is the largest employing industry in the region, showing consistent growth from 2015 to 2019, increasing over 11,400 jobs since 2015. *Retail Trade* is the second largest industry despite declining jobs at 0.5 percent a year since 2015. *Accommodation and Food Services* added over 3,600 jobs, an increase of 0.7 percent each year for the region.

Manufacturing continues to grow at an annualized 1.0 percent. *Administrative and Support* grew by over 5,200 jobs. Lastly, the *Professional, Scientific, and Technical Services* industry gained over 4,000 jobs.

St. Louis Region Top Employing Industries

Industry	Employment 2015	Employment 2019	Net Change	2015-2019 Empl. CAGR	2019 Annual Wages
Health Care & Social Assistance	170,753	182,248	11,495	1.3%	\$49,968
Retail Trade	109,346	106,546	(2,800)	-0.5%	\$33,888
Accommodation & Food Services	100,629	104,299	3,670	0.7%	\$22,740
Manufacturing	90,048	94,796	4,748	1.0%	\$68,832
Admin Support & Waste	77,056	82,279	5,223	1.3%	\$48,300
Educational Services	80,460	78,235	(2,225)	-0.6%	\$55,056
Prof., Scientific, & Technical Services	69,052	73,114	4,062	1.1%	\$82,500
Finance & Insurance	58,914	64,726	5,812	1.9%	\$86,280
Construction	49,191	54,656	5,465	2.1%	\$66,360
Wholesale Trade	53,908	53,712	(196)	-0.1%	\$76,092
Mngmt of Companies & Enterprises	42,098	41,238	(860)	-0.4%	\$96,696
Transportation & Warehousing	34,838	38,155	3,317	1.8%	\$52,332

SOURCE: LEHD-QWI, 2015-2019 2ND QUARTER

LOCATION QUOTIENT

To understand the major industries within a region, an analysis of industry concentration or clustering can be useful. The Location Quotient (LQ) describes the concentration of an industry in a geographic region, in relation to the nation, with 1.0 being the national average. Industries higher than 1.0 indicate a concentration.

The St. Louis Region has higher concentrations in *Management of Companies*, *Chemical Manufacturing*, *Beverage and Tobacco Manufacturing*, and *Hospitals* just to name a few.

Large employers do not necessarily have a high LQ, though sometimes that is the case. The St. Louis Region's largest employers include health care providers Barnes-Jewish Hospital, SSM-St. Mary's Hospital, Mercy Hospital System, and St. Luke's Hospital among others.

Anheuser-Bush, Enterprise, General Motors, Boeing, Nestle Purina, Edward Jones, and Wells Fargo all ranked among the top employers in their respective industry sectors.

The University of Missouri—St. Louis is a major public sector employer in the region.



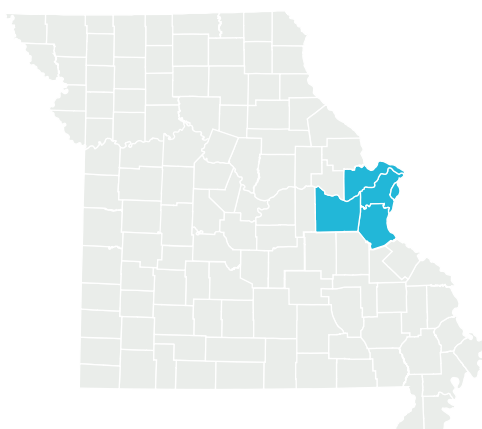
2019 St. Louis Region Location Quotients

Industry	Employment	Location Quotient
Management of Companies & Enterprises	39,231	2.1
Chemical Manufacturing	11,699	1.8
Beverage & Tobacco Product Manufacturing	3,686	1.7
Hospitals	64,240	1.6
Securities, Commodity Contracts, Investment	10,595	1.5
Machinery Manufacturing	12,507	1.5
Telecommunications	7,675	1.4
Printing & Related Support Activities	4,545	1.4
Broadcasting, except Internet	2,779	1.4
Data Processing, Hosting & Related Services	3,467	1.3
Social Assistance	39,563	1.3
Insurance Carriers & Related Activities	22,711	1.2
Merchant Wholesalers, Durable Goods	30,003	1.2
Nonstore Retailers	5,319	1.2
Performing Arts & Spectator Sports	4,707	1.2
Educational Services	26,633	1.2
Plastics & Rubber Products Manufacturing	6,543	1.2

SOURCE: MERIC, QCEW, 2019 ANNUAL AVERAGES

ST. LOUIS REGION

Projected growth by industry helps to identify future employment needs for an area. Projections indicate that the largest growth industries in the St. Louis Region will be *Hospitals, Ambulatory Health Care Services, Nonstore Retailers, Professional, Scientific, and Technical Services, Food Services and Drinking Places, and Educational Services*.



St. Louis Region Largest Growth Industries 2018-2028

Industry	Employment		Change	
	2018 Estimated	2028 Projected	2018-2028 Numeric	2018-2028 Percent
Hospitals	69,463	80,126	10,663	15.4%
Ambulatory Health Care Services	47,684	55,162	7,478	15.7%
Nonstore Retailers	5,157	8,828	3,671	71.2%
Professional, Scientific, & Technical Services	65,166	68,616	3,450	5.3%
Food Services & Drinking Places	88,704	92,072	3,368	3.8%
Educational Services	82,403	85,543	3,140	3.8%
Data Processing, Hosting & Related Services	6,265	9,125	2,860	45.7%
Merchant Wholesalers, Durable Goods	28,651	31,391	2,740	9.6%
Specialty Trade Contractors	34,062	36,123	2,061	6.1%
Warehousing & Storage	4,184	5,731	1,547	37.0%

SOURCES: MERIC INDUSTRY PROJECTIONS

PROJECTED GROWTH BY INDUSTRY HELPS TO IDENTIFY FUTURE EMPLOYMENT NEEDS FOR AN AREA.

OCCUPATIONAL PROJECTIONS

MERIC produces occupational projections that estimate labor demand over a 10-year period. MERIC categorizes these occupations using its Now-Next-Later method to help job seekers understand the training, education, and experience requirements for various occupations.

Now jobs typically require short-term on-the-job training, little to no experience, and/or a high school diploma. Now occupations include *Combined Food Preparation and Serving Workers, Personal Care Aides, and Cashiers* which lead the way in total openings. *Personal Care Aides, Home Health Aides, and Cargo and Freight Agents* are projected to be the fastest growing Now occupations over the next decade.

Next jobs typically require a non-degree certificate, associate degree, apprenticeship, some experience, or moderate- to long-term training. *Secretaries and Administrative Assistants, Cooks, and Nursing Assistants* will have the most openings for the Next category of occupations. *Respiratory Therapists, Occupational Therapy Assistants, and Phlebotomists* are the fastest growing Next occupations.

Later jobs typically require a bachelor's degree or higher. For Later occupations, *Registered Nurses, General and Operations Managers, and Accountants and Auditors* will have the most openings. *Information Security Analysts, Nurse Practitioners, and Speech-Language Pathologists* are the fastest growing Later occupations.

St. Louis Region Fastest Growing Occupations



NOTE: OCCUPATIONS WITH NET INCREASE OF LESS THAN 50 ARE OMITTED

SOURCE: MERIC OCCUPATIONAL PROJECTIONS, 2018-2028

★ DENOTES OCCUPATIONS TOP TEN ONLINE JOB ADS FOR 2019-2020 IN THE REGION AND WITHIN THE NOW-NEXT-LATER CLASSIFICATIONS

ST. LOUIS REGION

St. Louis Region Long-Term Occupational Projections by Top Openings

Occupation	2018 Estimated Employment	2028 Projected Employment	Growth Openings	Exits	Transfers	Total Openings	Median Wages
NOW							
Combined Food Preparation and Serving Workers	30,802	33,644	2,842	2,569	3,169	6,022	\$19,946 ★
Personal Care Aides	26,912	36,536	9,624	2,344	2,078	5,384	\$22,690 ★
Cashiers	23,903	22,305	-1,598	2,062	2,296	4,198	\$22,046 ★
Retail Salespersons	31,298	28,254	-3,044	1,711	2,638	4,045	\$24,292
Waiters and Waitresses	18,932	18,661	-271	1,304	2,303	3,580	\$19,131 ★
NEXT							
Secretaries and Administrative Assistants	26,049	23,215	-2,834	1,262	1,495	2,474	\$37,246
Cooks, Restaurant	11,607	13,091	1,484	656	1,091	1,895	\$25,217 ★
Nursing Assistants	14,506	15,979	1,473	819	889	1,855	\$25,356 ★
Heavy and Tractor-Trailer Truck Drivers	12,836	14,104	1,268	555	977	1,659	\$50,327 ★
Bookkeeping, Accounting, and Auditing Clerks	13,016	12,128	-888	765	700	1,376	\$38,240
LATER							
Registered Nurses	33,480	39,121	5,641	1,007	931	2,502	\$64,889 ★
General and Operations Managers	18,980	19,790	810	406	1,277	1,764	\$102,537 ★
Accountants and Auditors	12,347	12,708	361	353	814	1,203	\$70,735
Business Operations Specialists, All Other	7,199	7,547	348	200	508	743	\$72,932
Software Developers, Applications	7,292	8,754	1,462	111	454	711	\$98,176

SOURCE: MERIC OCCUPATIONAL PROJECTIONS 2018-2028

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This report was prepared by the staff of the Missouri Economic Research and Information Center (MERIC) as part of the Missouri Workforce Report. All data in this report was current at the time of publication and is subject to revision. Additional details on data sources can be found in the full report.

This workforce solution was funded by a grant awarded by the U.S. Department of Labor's Employment and Training Administration. The solution was created by the grantee and does not necessarily reflect the official position of the U.S. Department of Labor. The Department of Labor makes no guarantees, warranties, or assurances of any kind, express or implied, with respect to such information, including any information on linked sites and including, but not limited to, accuracy of the information or its completeness, timeliness, usefulness, adequacy, continued availability, or ownership.

2020 ECONOMIC REPORT

WEST CENTRAL REGION



The West Central Region is comprised of 13 counties in the west central part of Missouri. This region is home to cities including Warrensburg, Sedalia, Lexington, Clinton, and Nevada.

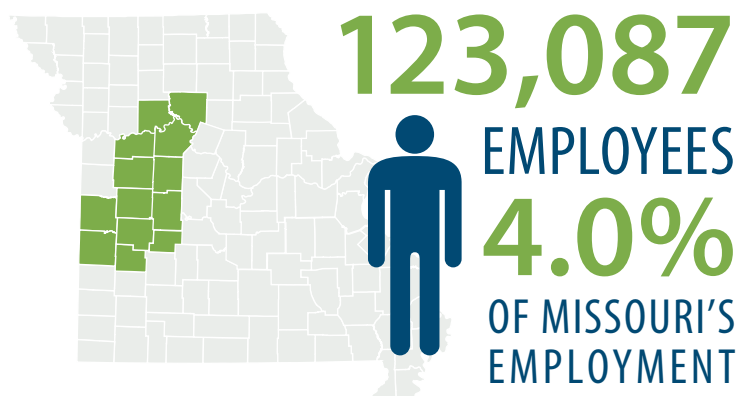
The West Central Region workforce has more than 123,000 employees, making up 4 percent of Missouri's employment. In 2019, 53 percent of the workforce was female and 47 percent was male.

The workforce is getting older in the West Central Region, a trend happening throughout Missouri and the U.S. In 2019, 25 percent of the workforce was age 55 or older, up from 21 percent a decade earlier.

For the region, 7 percent of the workforce was non-white, compared to 17 percent for the state; 5 percent of the region's workforce was Hispanic or Latino, compared to 4 percent for Missouri.

For 5 percent of the region's population ages (18 to 64) the primary language spoken at home is something other than English. By comparison, Missouri was at 7 percent and the U.S. population at 23 percent.

The West Central Region has a higher percentage of the population with a disability compared to the state and the nation. For the West Central Region, 16 percent of the population has a disability compared to 13 percent in Missouri and 10 percent in the U.S.



Workforce Demographics

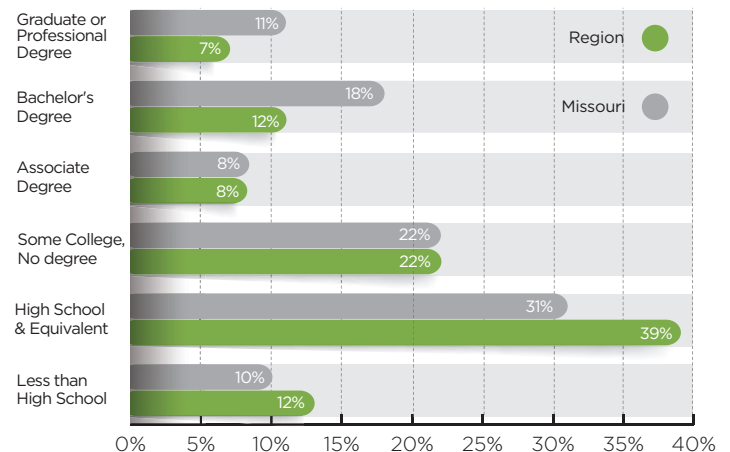
	WC Region	Missouri	Nationwide
Average monthly employment in 2019	123,087	2,981,688	150,939,000
Average Unemployment Rate in 2019	3.6%	3.3%	3.7%
Female	53%	51%	50%
Male	47%	49%	50%
Non-white	7%	17%	23%
Hispanic or Latino	5%	4%	16%
Ages 55 and older	25%	23%	23%
With disabilities (ages 18-64)	16%	13%	10%
Below Poverty Levels (ages 18-64)	16%	14%	13%
Language other than English (ages 18-64)	5%	7%	23%
Associate degree or higher: Edu Attain.	26%	37%	40%

SOURCES: CENSUS ACS 2018-5YR EST.; LEHD 2ND QUARTER; BLS QCEW NOT-SEASONALLY ADJUSTED

Educational attainment rates for the West Central Region are lower than those of the state in regards to bachelor's or advanced degrees. Twenty-six percent of the region's population, age 25 and older, has an associate, bachelor's or advanced degree compared to 37 percent for the state.

The regional unemployment rate was 3.6 percent in 2019 overall. In May 2019 the rate was at 3.3 percent and as of May 2020 the preliminary rate stood at 7.8 percent, an increase of 4.5 points. This increase was a direct result of business shutdowns and job losses due to the COVID-19 pandemic.

Educational Attainment



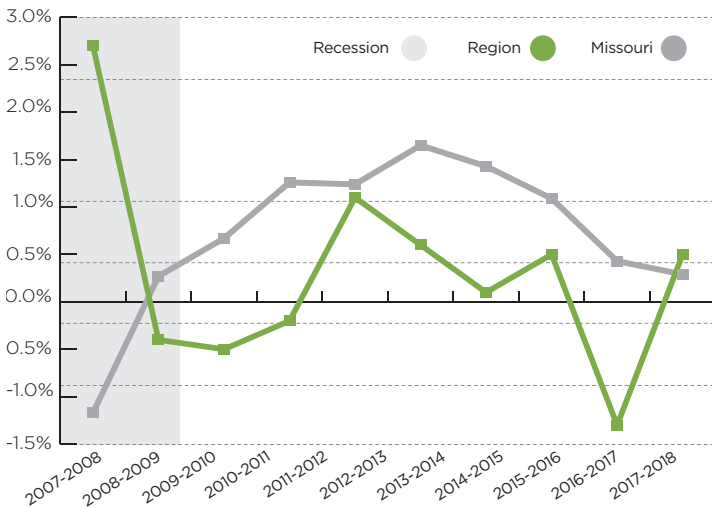
SOURCE: US CENSUS BUREAU, ACS 2018 5-YEAR ESTIMATES

WEST CENTRAL REGION

INDUSTRY ANALYSIS

The West Central Region averaged over 84,800 employees in June 2019. The region gained 455 jobs from June 2018 to June 2019, resulting in a 0.5 percent employment growth. Missouri employment increased by 0.3 percent in that time. From 2015 to 2019, the West Central Region averaged 0.02 percent annual growth for an overall increase of 0.1 percent; during that same period Missouri's employment grew 3.6 percent.

West Central Employment Annual Growth Rate



SOURCE: MERIC, QCEW

The *Health Care and Social Assistance* industry continues to be one of the largest employing industries in the region with over 16,200 jobs. *Manufacturing* is the second largest industry in the area at over 12,200 jobs and an annual growth rate of 0.8 percent. *Educational Services* is the third largest industry at nearly 10,500 jobs.

Retail Trade lost 641 jobs, but maintains a workforce over 9,900 in the region. *Wholesale Trade* has the highest annualized growth at 2.3% and gained 348 new jobs since 2015. *Transportation and Warehousing* also had higher annualized growth at 1.7 percent.

West Central Region Top Employing Industries

Industry	Employment		2015-2019		2019 Annual Wages
	2015	2019	Net Change	Empl. CAGR	
Health Care & Social Assistance	16,165	16,203	38	0.0%	\$36,708
Manufacturing	11,757	12,217	460	0.8%	\$45,720
Educational Services	11,217	10,499	(718)	-1.3%	\$46,416
Retail Trade	10,555	9,914	(641)	-1.2%	\$28,080
Accommodation & Food Services	7,038	6,986	(52)	-0.1%	\$16,284
Public Administration	3,768	3,720	(48)	-0.3%	\$27,300
Construction	3,531	3,531	0	0.0%	\$43,452
Wholesale Trade	2,851	3,199	348	2.3%	\$53,004
Finance & Insurance	2,584	2,727	143	1.1%	\$45,936
Admin Support & Waste	2,782	2,339	(443)	-3.4%	\$36,228
Transportation & Warehousing	1,941	2,107	166	1.7%	\$43,656
Other Services (except Public Admin)	2,041	2,080	39	0.4%	\$27,840

SOURCE: LEHD-QWI, 2015-2019 2ND QUARTER

LOCATION QUOTIENT

To understand the major industries within a region, an analysis of industry concentration or clustering can be useful. The Location Quotient (LQ) describes the concentration of an industry in a geographic region, in relation to the nation, with 1.0 being the national average. Industries higher than 1.0 indicate a concentration.

The West Central Region has higher concentrations in *Gasoline Stations*, *Animal Production*, *Food Manufacturing*, *Machinery Manufacturing*, *Nursing and Resident Care*, and *Fabricated Metal Manufacturing* just to name a few.

Large employers do not necessarily have a high LQ, though sometimes that is the case. The West Central Region's largest employers include health care providers Freeman Health System, Northwest Community Services, Golden Valley Memorial Healthcare, Bothwell Regional Health Center, and Western Missouri Medical Center.

The West Central region has several manufacturers including Tyson Food—Deli Inc, General Cable, 3M Company, Tracker Marine, and Coreslab Structures Inc.

Public sector employers in this region include Whiteman Air Force Base, University of Central Missouri, and State Fair Community College.



HIGHEST 2019
LQ 3.9
GASOLINE STATIONS

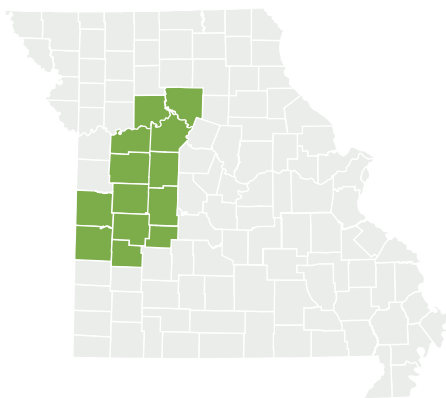
2019 West Central Region Location Quotients

Industry	Employment	Location Quotient
Gasoline Stations	1,840	3.9
Food Manufacturing	2,053	2.5
Animal Production & Aquaculture	323	2.5
Machinery Manufacturing	1,267	2.3
Nursing & Residential Care Facilities	3,703	2.2
Fabricated Metal Product Manufacturing	1,560	2.1
Agriculture & Forestry Support Activities	385	2.0
Primary Metal Manufacturing	371	1.9
Motor Vehicle & Parts Dealers	1,683	1.7
Building Material & Garden Supply Stores	1,043	1.6
General Merchandise Stores	2,394	1.6
Merchant Wholesalers, Nondurable Goods	1,627	1.5
Credit Intermediation & Related Activities	1,969	1.5
Social Assistance	2,904	1.5
Crop Production	332	1.2
Repair & Maintenance	780	1.2

SOURCE: MERIC, QCEW, 2019 ANNUAL AVERAGES

WEST CENTRAL REGION

Projected growth by industry helps to identify future employment needs for an area. Projections indicate that the largest growth industries in the West Central Region will be *Administrative and Support Services, Social Assistance, Construction of Buildings, Merchant Wholesalers (Nondurable Goods), and Educational Services.*



West Central Region Largest Growth Industries 2018-2028

Industry	Employment		Change	
	2018 Estimated	2028 Projected	2018-2028 Numeric	Percent
Administrative & Support Services	1,460	1,813	353	24.2%
Social Assistance	3,337	3,648	311	9.3%
Construction of Buildings	639	947	308	48.2%
Merchant Wholesalers, Nondurable Goods	1,460	1,730	270	18.5%
Educational Services	9,719	9,951	232	2.4%
Crop Production	1,194	1,390	196	16.4%
Food Services & Drinking Places	6,998	7,176	178	2.5%
Support Activities for Agriculture & Forestry	640	801	161	25.2%
Transit & Ground Passenger Transportation	522	681	159	30.5%
Local Government, Excl. Education & Hospitals	5,220	5,365	145	2.8%

SOURCES: MERIC INDUSTRY PROJECTIONS

PROJECTED GROWTH BY INDUSTRY HELPS TO IDENTIFY FUTURE EMPLOYMENT NEEDS FOR AN AREA.

OCCUPATIONAL PROJECTIONS

MERIC produces occupational projections that estimate labor demand over a 10-year period. MERIC categorizes these occupations using its Now-Next-Later method to help job seekers understand the training, education, and experience requirements for various occupations.

Now jobs typically require short-term on-the-job training, little to no experience, and/or a high school diploma. Now occupations include *Combined Food Preparation and Serving Workers, Cashiers, and Personal Care Aides* which lead the way in total openings. *Bus Drivers, Helpers-Production Workers, and Personal Care Aides* are projected to be the fastest growing Now occupations over the next decade.

Next jobs typically require a non-degree certificate, associate degree, apprenticeship, some experience, or moderate- to long-term training. *Secretaries and Administrative Assistants, Nursing Assistants, and Heavy and Tractor-Trailer Truck Drivers* will have the most openings for the Next category of occupations. *Carpenters, Medical Assistants, and Cooks* are the fastest growing Next occupations.

Later jobs typically require a bachelor's degree or higher. For Later occupations *Secondary School Teachers, General and Operations Managers, and Substitute Teachers* will have the most openings. *Market Research Analysts, Substance Abuse, Behavioral Disorder, and Mental Health Counselors, and Mental Health and Substance Abuse Social Workers* are the fastest growing Later occupations.

West Central Region Fastest Growing Occupations



NOTE: OCCUPATIONS WITH NET INCREASE OF LESS THAN 50 ARE OMITTED

SOURCE: MERIC OCCUPATIONAL PROJECTIONS, 2018-2028

★ DENOTES OCCUPATIONS TOP TEN ONLINE JOB ADS FOR 2019-2020 IN THE REGION AND WITHIN THE NOW-NEXT-LATER CLASSIFICATIONS

WEST CENTRAL REGION

West Central Region Long-Term Occupational Projections by Top Openings

Occupation	2018 Estimated Employment	2028 Projected Employment	Growth Openings	Exits	Transfers	Total Openings	Median Wages
NOW							
Combined Food Preparation and Serving Workers	3,173	3,367	194	261	322	602	\$18,824 ★
Cashiers	2,741	2,687	-54	242	270	507	\$19,421 ★
Personal Care Aides	2,704	3,238	534	220	195	468	\$21,670
Retail Salespersons	2,585	2,555	-30	148	228	373	\$22,746 ★
Waiters and Waitresses	1,526	1,485	-41	104	184	284	\$18,765
NEXT							
Secretaries and Administrative Assistants	2,370	2,120	-250	115	136	226	\$29,917
Nursing Assistants	1,865	1,882	17	101	109	212	\$21,670 ★
Heavy and Tractor-Trailer Truck Drivers	1,487	1,606	119	64	112	188	\$36,555 ★
Cooks, Restaurant	1,070	1,176	106	60	99	170	\$21,374
Welders, Cutters, Solderers, and Brazers	1,222	1,273	51	32	105	142	\$35,111
LATER							
Secondary School Teachers	2,001	2,050	49	56	86	147	\$44,190
General and Operations Managers	1,223	1,292	69	26	83	116	\$56,812
Substitute Teachers	989	1,013	24	58	56	116	\$27,276
Registered Nurses	1,495	1,561	66	42	39	88	\$58,855 ★
Elementary School Teachers	1,045	1,071	26	33	45	81	\$39,171

SOURCE: MERIC OCCUPATIONAL PROJECTIONS 2018-2028

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DATA SOURCES

GROSS DOMESTIC PRODUCT

U.S. Bureau of Economic Analysis. Regional Economic Accounts Data: Interactive Tables, Quarterly GDP by State, real GDP in chained dollars.

<https://apps.bea.gov/itable/iTable.cfm?ReqID=70&step=1>

PERSONAL INCOME

U.S. Bureau of Economic Analysis. Regional Economic Accounts Data: Interactive Tables, Annual State Personal Income. Table SAINC1— Personal Income, Population, Per Capita Personal Income; Table SAINC4— Personal Income by Major Component; Table SAINC35— Personal Current Transfer Receipts.

<https://apps.bea.gov/itable/iTable.cfm?ReqID=70&step=1>

MERIC. 2019—2020. Cost of Living Data Series.

<https://meric.mo.gov/data/cost-living-data-series>

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U.S. Dept. of Labor, Bureau of Labor Statistics. Demographics from the Current Population Survey.

<https://www.bls.gov/cps/demographics.htm>

U.S. Dept. of Labor, Bureau of Labor Statistics. Local Area Unemployment Statistics.

<https://www.bls.gov/data/#unemployment>

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U.S. Dept. of Labor, Bureau of Labor Statistics. Local Area Unemployment Statistics.

<https://www.bls.gov/data/#unemployment>

U.S. Dept. of Labor, Bureau of Labor Statistics. Current Employment Statistics.

<https://www.bls.gov/data/#employment>

MERIC in cooperation with the U.S. Dept. of Labor, Bureau of Labor Statistics. Quarterly Census of Employment and Wages, micro-data, 2009-2019.

U.S. Dept. of Labor, Employment and Training Administration (ETA). The Workforce Innovation and Opportunity Act of 2014.

<https://www.doleta.gov/wioa/>

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U.S. Census Bureau. Longitudinal Employer Household Dynamics (LEHD). LED Extraction Tool. Worker characteristics by Sex and Age; by Sex and Education by Race and Ethnicity.

<http://ledextract.ces.census.gov/>

U.S. Census Bureau. American Community Survey (ACS), 2013-2018 Five-Year Estimates. Disability Characteristics. Table DP02.

<https://data.census.gov/cedsci/>

U.S. Census Bureau. American Community Survey (ACS), 2013-2018 Five-Year Estimates. Age by Language Spoken at Home for the Population 5 Years and Over. Table S1603.

<https://data.census.gov/cedsci/>

U.S. Census Bureau. American Community Survey (ACS), 2013-2018 Five-Year Estimates. Below Federal Poverty Line for Ages 18-64. Table S1701.

<https://data.census.gov/cedsci/>

INDUSTRY ANALYSIS

MERIC in cooperation with the U.S. Dept. of Labor, Bureau of Labor Statistics. Quarterly Census of Employment and Wages (QCEW), micro-data.

EMSI and Infogroup Largest Employers from database analysis.

LABOR MARKET ANALYSIS

MERIC in cooperation with the U.S. Bureau of Labor Statistics. Local Area Unemployment Statistics (LAUS). Data not seasonally adjusted.

<https://meric.mo.gov/data/unemployment>

MERIC in cooperation with Burning Glass Technologies.

Labor Insight.™

MERIC in cooperation with the Missouri Office of Workforce Development.

OCCUPATIONAL PROJECTIONS

MERIC in cooperation with the U.S. Dept. of Labor, Bureau of Labor Statistics. Occupational Employment Projections.

<https://meric.mo.gov/workforce-research/occupational-projections>

APPENDIX

MISSOURI WORKFORCE DEVELOPMENT REGIONS BY COUNTY

